

Welcome to ClubRunner!

District Training Presentation to Clubs

Press <space> or left-click on mouse to advance to the next slide



Connect. Collaborate. Communicate.

What is ClubRunner?

Congratulations! Your District is subscribed to ClubRunner, a software service that manages club and membership information as well as facilitate easier communication between the District and its clubs.

ClubRunner...

- Is a private software company that has been serving thousands of Rotary clubs worldwide for nearly 10 years.
- Was created by and is operated by 3 Past Presidents in Canada
- Is the largest software provider to Rotary clubs worldwide, in six continents
- Was the first company to integrate its database with Rotary International in November 2010 and is the leader in terms of fields integrated

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• Is an Official Rotary International Licensee

What Does ClubRunner Do?

ClubRunner will help your district with the following tasks:

- Seamlessly integrate the **district database** with Rotary International, securely
- Produce **unlimited reports** to help identify membership growth
- Maintain organizational charts with committee structures
- Maintain club executive/director listings, accessible by Rotarians in the district
- Generate password-protected **district directories** in several formats
- Track and report club attendance
- Send out targeted and personalized email communication and newsletters
- Manage event registrations and reporting, with online payment
- Allow every club to login and maintain their own information

ClubRunner

District Website

Access useful content aimed for club executives and Rotarians

Access the publicly available Club and District Info



Calendar for upcoming District events

Access links to other websites related to Rotary

ClubRunner

Club Directory

The Club Directory page displays all clubs, their meeting days and times, along with President names, and links to club websites

Choose from Alphabetical listing or Sorted by Meeting Day/Time

Club Directory & Contact

ID#	Club	President	Internal	External	Мар	Meeting Day and Time
4757	Avon	Johannes Koomen		Website	<u>Map</u>	Tuesday 6:00 PM
4758	Bath	Bernard Burns			<u>Map</u>	Thursday 12:00 PM
4759	Belmont	James Arthur			<u>Map</u>	Wednesday 6:00 PM
4761	<u>Bloomfield</u>	Donald Cicchino		<u>Website</u>	<u>Map</u>	Monday 7:30 AM
4762	<u>Brighton</u>	Richard Marchese		Website	<u>Map</u>	Monday 6:00 PM
4763	Brockport	Fred Kimmel		Website	<u>Map</u>	Thursday 6:15 PM
4764	Caledonia-Mumford	Chris Wood		Website	<u>Map</u>	Tuesday 6:00 PM
4765	<u>Canandaigua</u>	Linda Collins		Website	Map	Thursday 12:15 PM
4766	<u>Canisteo</u>	Linda Mullen			<u>Map</u>	Wednesday 12:00 PM
26837	Chemung County Sunrise	RC lke		Website	Map	Wednesday 7:00 AM

When & Where Clubs Meet

	Club	President	Location	Мар	Meeting Day and Time
۵	Bloomfield	Donald Cicchino	Location	Map	Monday 7:30 AM
	<u>Naples</u>	William Grove	Location	Map	Monday 12:00 PM
۵	<u>Geneseo</u>	Matthew Gaynor	Location	<u>Map</u>	Monday 12:15 PM
۵	<u>Brighton</u>	Richard Marchese	Location	Map	Monday 6:00 PM
۵	<u>Gananda</u>	Dawn Reeners	Location	<u>Map</u>	Monday 6:00 PM
۵	Fairport	Robert Hunt	Location	Map	Monday 6:15 PM
۵	Livonia	George Harvey	Location	<u>Map</u>	Monday 6:15 PM
۵	Spencerport	William Ewsuk	Location	<u>Map</u>	Monday 6:15 PM
۵	<u>Williamson</u>	<u>James Hoffman</u>	Location	<u>Map</u>	Monday 6:15 PM
۵	<u>Waterloo</u>	<u>Paula Kenny</u>	<u>Location</u>	<u>Map</u>	Monday 6:30 PM

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Club Details Page

Clicking on a club name will display details for that club, including:

- Meeting day/time
- Meeting location
- Assistant Governor
- Club President
- Executives/Directors
- Committees
- Upcoming Speakers
- Upcoming Events
- Link to Club Bulletin
- Link to Club Site

ClubRunner

Rotary Club of Elmira (#4774) Meeting Information: Upcoming Speaker Program Tuesday at 12:00 PM Elmira Riverview Holiday Inn 760 E. Water Street Kaye Newbury, Mar 19, 2013 Elmira NY 14901-3399 Sheriff Chris Moss, Apr 9, 2013 LMIRA, M.Y United States Sherry Auble, Financial Coach & Financial Planner, Jun 5, 2013 View mar View complete list Area Governor: Katrina Stanton Upcoming Club Events No events to display. View Club Bulletin Club Websi Business Cards Viev View complete list President Please login to view contact info Karl Schwesinger Club Executives Name Title Please login to view contact info President Elect Thomas Brown Vice President Amanda Harkness Secretary Polly Smith-Blackwell Treasurer Andrew Rothstein Club Directors Title Name Please login to view contact info Club Service Laura Lee Liberatore Vocational Service M. Edward Lincoln Community Service David Lamoureux Committees

No committees found for this club



District Organization Chart

Displays all District Executives, Officers, Assistant Governors and their clubs and executives, committee directors and subcommittee chairs.

Links go to a private email form to allow members to be contacted by public without divulging email addresses.

Organization Chart

District Governor Title Name District Governor Jeffrey Krans (Penn Yan)

Previous Year | Current Year: 2010-11 | Next Year

District Executives

Title	Name
District Governor Elect	Norma Madayaq-Reilly (Newark Rotary Club)
District Governor Nominee	J. Gaven Hurley (Pittsford)
District Governor Nominee Designate	Ellen Hughes (Waterloo)

District Officers and Directors

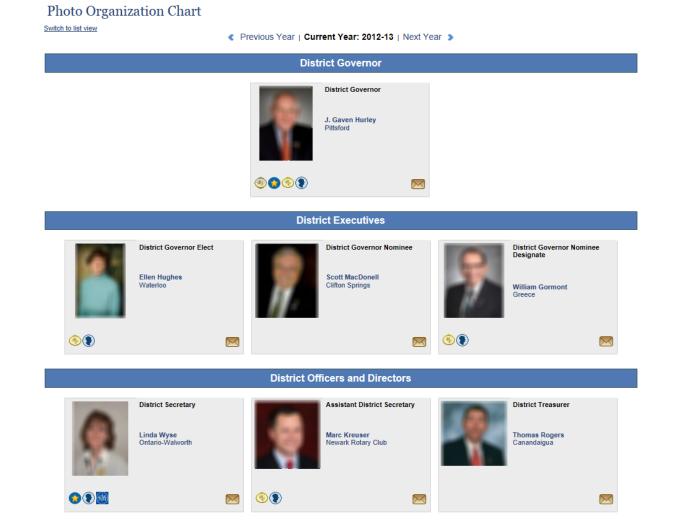
Title	Name
District Secretary	William Redden (Lima)
Assistant District Secretary	Bruce Spector (Pittsford)
District Treasurer	Charles Clemens (Elmira Heights)
Assistant District Treasurer	Thomas Rogers (Canandaigua)
Assistant District Treasurer	Alan Rosbrook (Victor-Farmington)
Foundation Director	Donald Alhart (Rochester)

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District Photo Organization Chart

Displays all District Executives, Officers, Assistant Governors and their clubs and executives, committee directors and subcommittee chairs.

Links go to a private email form to allow members to be contacted by public without divulging email addresses.



ClubRunner

Private Email Form

General Email Message

Send email to David Rands

Enter your email address and the message you want to send.

To:	David Rands	
Your First Name:		
Your Last Name:		
Your Email Address	×	
Subject:		
Message:		Ŀ.
	ANHUO	
	Enter the above code here:	

Can't read? Try different words.



ClubRunner

Logging In

- Start at the District homepage, located at: <u>www.clubrunner.ca/XXXX</u> (Where XXXX is your District #)
- Click on the Login link at the top right. All members in the District can login. The system will recognize your level automatically and grant you the appropriate access.





Logging In – Request Password

 On the Login page, click on 'New and Existing Users – Retrieve Your Password'

Enter your login information below: Login Name: Password: New and existing users - Retrieve your password Online Help Sign-in Remember me on this computer
--





Logging In – Request Password

- Choose club from list, enter last name and email address
- Press Get Login Info button. Watch for the email to arrive in your inbox.

	Forge	ot Your Passwo	ord?	
All members in the District hav please contact your Club Pres Select your club and enter the	ident, or email to clubrur	nner@doxess.co	m.	
* Denotes a required field.				
Select Club:	Select Club	•		
Last Name:				



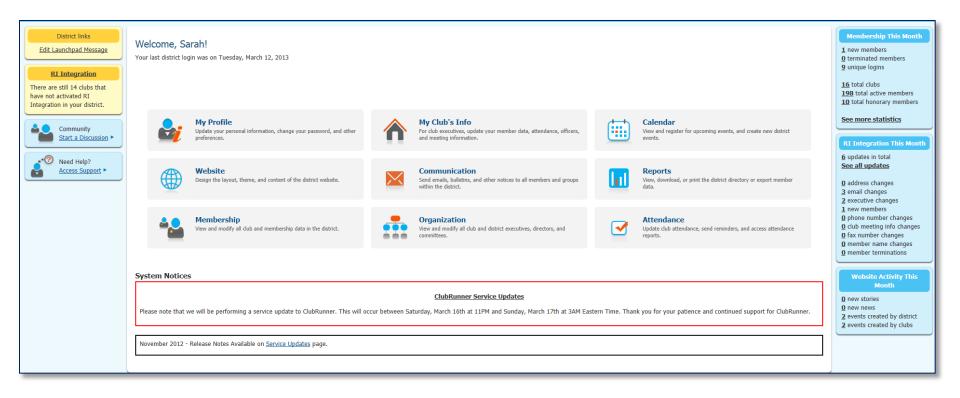
Access Levels to Members Area

There are 3 main levels of access to the Communication Intranet:

- **District Level** can access and maintain all District organization charts, as well as all Club listings
- Club Executive Level can access and update all information pertaining to your club and members, including attendance reporting, club executive listings, and membership adds/edits/terminations.
- Member Level can access and update your own membership profile directly regardless of position in club or district. Can also access district directories once logged in.

Launchpad

Your starting point when logged into the District site.





What can Regular Members Do?

Once logged in, any Rotarian in the District can:

- Update their own membership profile
- View and download district directory reports
- Search for members in the online directory
- Register for any District event
- Access District Committees and view/post info if a member of that committee





What Can Club Executives Do?

Everything a regular member can do, plus:

- Update their club membership listing
- Specify current and next year's club executives
- Update their club information such as meeting time, date, location, and website address
- Report monthly attendance
- Register members for district events





District Directories & Reports

Don't see a re Build a custor flexible eDire

Launch eDir

District Dash Rule of 85 Gender Distr

Gender Distri Age Distribu Age Distribu Years of Ser

Years of Sei

View and do particular clu Export Club I

All members can download a Word or PDF version of the District Directory, which is generated from all the data on the website

Choose from a variety of district directories, search the directory, view trend reports such as the District Dashboard, Age/Gender Distribution reports. View a report showcasing club positions. Build a custom report with the eDirectory builder.

Search Directory Lookup Member	Rotary District 9999 eDirectory Please note the date of the report to ensure you are using an up-to-date version. Click on the Regenerate button to request a refreshed copy, which will be done overnight.			
Custom Export	Previous Year Current Year: 2012-13 Next Year			
	Yearly Reports	Generated		
eDirectory Builder	Club and District Leadership Directory Alphabetical listing by city and Club. Includes contact information for club leadership, club committee assignments and district assignments.	Jan 30, 2013	Regenerate	200
tom report with our highly rectory Builder!	Club Executives and Directors Club Executives and Directors description	Jan 30, 2013	Regenerate) 205
irectory Builder	Club Presidents Double column layout of all Presidents with photo and full contact information.	Never	Regenerate	200
Trend Reports	Committees Double column layout of all committees along with committee chair names and email addresses.	Never	Regenerate	1
Growth Report Shboard	District Organization and Presidents District Organization and Presidents	Never	Regenerate	20
tribution (Summary) tribution (Members)	District Organization and Presidents (Photo) District Organization and Presidents	Never	Regenerate	
ution (Summary) ution (Members)	District Organization and Presidents * District Organization Chart and listing of all Club Presidents.	Nov 16, 2011	Regenerate	200
ervice Distribution (Summary) ervice Distribution (Members)	District Organization Chart District Governor and Officers (including AG's) along with photos and full contact information.	Nov 28, 2012	Regenerate)
Club Positions	District Organization Directory Photos and contact information for District executive leadership, senior assistant governors, assistant governors, club presidents, district committee chairs, advisors and chairs for major district events and activities, and Rotaract and Interact governors. Listings include club affiliation.	Never	Regenerate	20
lownload members in a		2		
lub position for all clubs. Positions	Standing Reports	Generated		
210310013	Club Information Double column layout of all clubs in the District along with meeting information.	Nov 28, 2012	Regenerate)
	club photo directory blah	Never	Regenerate	1
	Test64	Nov 29, 2012	Regenerate	<u>)</u>

Reports available include:

Club size/Growth Report District Dashboard Rule of 85 Gender and Age Distribution Years of Service Distribution

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District Directories & Reports

A sample of one of the available directories.

A44.

Members can print this at home, or save on their computer for future use.

A text version of the download is also available for import into Handhelds or contact software.

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Name	Position	Club	Email	Home Tel	Work Tel
Brad Pitt	District Governor	Sunnytown	support@clubrunner.ca		
Leslie Reinhart	governor elect	Sterling Heights			
Bruce Street	Secretary	Belleville	clubrunner@doxess.com		
Mike Wilson	Treasurer	Westmount	support@clubrunner.ca		
April Wilkins	District Trainer	Dawson Creek	clubrunner@doxess.com		
April Wilkins	RYLA Chair - 2005	Dawson Creek	clubrunner@doxess.com		
Homer Simpson	District Assistant Governor	Anaheim	support@clubrunner.ca		
Louise Hanson	District Assistant Governor	Sunnytown	support@clubrunner.ca	555-1234	555-8675
Bill Wilson	Vocational Services	Dawson Creek	clubrunner@doxess.com		
Carl Carlson	President	Anaheim	clubrunner@doxess.com		
Homer Simpson	President-Elect	Anaheim	support@clubrunner.ca		
Lisa Simpson	Secretary	Anaheim	clubrunner@doxess.com		
Marge Simpson	Treasurer	Anaheim	support@clubrunner.ca		
Bruce Street	President	Belleville	clubrunner@doxess.com		
Crystal Warden	President-Elect	Belleville	clubrunner@doxess.com		
Crystal Warden	Secretary	Belleville	clubrunner@doxess.com		
Bill Wilson	President	Dawson Creek	clubrunner@doxess.com		
April Wilkins	Secretary	Dawson Creek	clubrunner@doxess.com		
Leslie Reinhart	President	Sterling Heights	ŭ		
Leslie Reinhart	Secretary	Sterling Heights			
John Joyce	Treasurer	Sterling Heights			
Sarah Nelson	President	Sunnytown	support@clubrunner.ca	905-555-8989	905-555-039
Cynthia Wong	President-Elect	Sunnytown	support@clubrunner.ca		
Laura Gibbons	Secretary	Sunnytown	support@clubrunner.ca	555-1234	555-9090
lan Davies	Treasurer	Sunnytown	support@clubrunner.ca		
Steven Shen	President	Test Club	steven.shen@doxess.com		
jenni jenni	President-Elect	Test Club	jennie.jiang@doxess.com		
Prospective Jiang	Secretary	Test Club	jennie.jiang@doxess.com		
Don Brown	President	Westmount	clubrunner@doxess.com		
Linda Harris	President-Elect	Westmount	support@clubrunner.ca		
Joe Johnson	Secretary	Westmount	clubrunner@doxess.com		
EAST TARG		141 1 1	La Č		

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District Directories & Reports

To easily find members of a club, you can search the district database by first or last name, email address or classification.

Search Membe	r	
	er in the District use any of email must use a complete	he following fields. All fields are combined to perform the search. Member records that begin with the First name and Last name criteria are returned. Records that partially contain the words under Classification are address.
Club	All Clubs	
First Name		
Last Name		
Email		
Classification		
		Search

Search Member

1 Result(s) Returned

Click on the plus sign E	to expand listing. Click on t	ne envelope icon 📁 to email a member.				
Email	Name		Club	Classification	Work Phone	
٨			Oliver	Management	905-555-0396	
Page 1 of 1						1
Search Again						
Club	All Clubs	•				
First Name	sarah					
Last Name	sunset					
Email						
Classification						
				Search		

Once results are returned, they will appear in a list format. Click on a name to view contact details. Click on the email icon to email the member.

ClubRunner

Committees Management

Create, manage and store all committees lists along with designated Chairpersons, Secretaries and members.

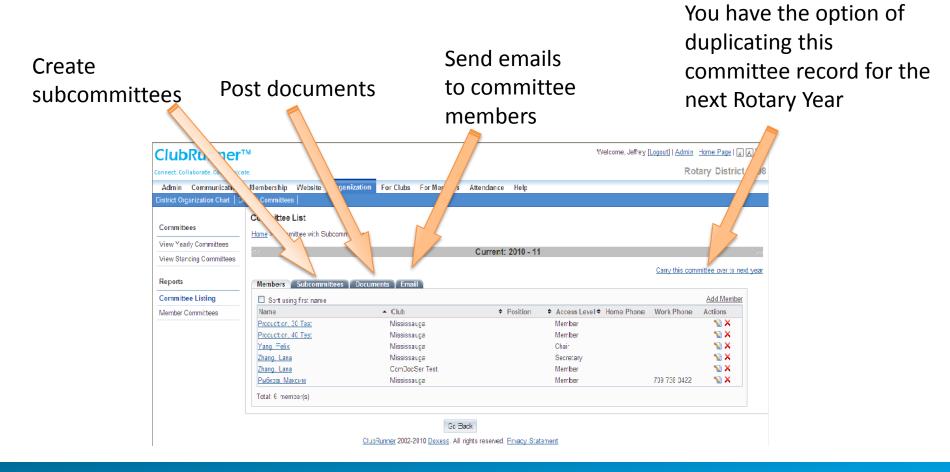
Admin	For Clubs	For Members	Membershi	Organization	Communication	Website	Reports	Attendance	Events 2.0	Help								
District (Organization C	Chart District Co	mmittees [efine Club Position T	ypes Define Club	Executives	District eD	rectory Reports	2.0 District	eDirectory Builder 2.	2.0							
Committ	ees		С	ommittees														
View Year	ly Committee	es	<	<u><</u>							Cur	rent: 2012	2 - 13					<u>>></u>
	,																	Add New Committee
view Star	ding Commit	tees		lame											(Chair	Туре	Actions
			istrict Assistant Gov	ernor (Director: <u>Ni</u>	kname Ferm	án)												
Reports				istirct Committee												Ron Murrell		😒 🗙 🛂 🔝
Committe	e Listing		s	ecretary (Director: 🛽	<u> (ario Lemieux</u>)													
Member (Committees		1	Foundation										🐒 🗙 👿 🔝				
			т	otal: 2 committee(s)														





Committees Management

ClubRunner



Club Executive Functions



ClubRunner

Active Members List

Click on any nam to Edit	Select Club: Members pe	embers List Oliver er Page: 25 : B C D E E G H I J K L M N O P O R S I U V W X Y Z	Mark Ex to Terminate		Add New Member
	Email	🗏 By First Name 🔺	Туре	Acr	Action
	\sim	Aaron, Mike	Corporate	50	Designation Mark Ex Reset Password
		Abby, Joe	Active	70	Designation Mark Ex Reset Password
	0	Abram, John	Honorary	70	Designation Mark Ex Reset Password
		Adams, Vivian	Active	50	Designation Mark Ex Reset Password
		<u>Andersen, Andru</u>	Active	90	Designation Mark Ex Reset Password
		Anderson, Brian	Active	80	Designation Mark Ex Reset Password
		Beneficio, Carlos	Active	80	Designation Mark Ex Reset Password
		Body, Busy	Active	30	Designation Mark Ex Reset Password
		Brookshaw, Shelly	Active	30	Designation Mark Ex Reset Password
		Campbell, Barry	Active	70	Designation Mark Ex Reset Password
		Campbell, Timothy	Active	50	Designation Mark Ex Reset Password
		<u>Chappell, Barbara</u>	Active	50	Designation Mark Ex Reset Password
		Connery, Paul	Active	80	Designation Mark Ex Reset Password
		<u>Considine, Lee</u>	Active	50	Designation Mark Ex Reset Password
		Copher, James	Active	50	Designation Mark Ex Reset Password
		Courchaine, Paul	Active	50	Designation Mark Ex Reset Password
		Cuthbertson, Toni	Active	70	Designation Mark Ex Reset Password
		Davidson, Joe	Active	50	Designation Mark Ex Reset Password
		Davidson, Stuart	Active	70	Designation Mark Ex Reset Password
		Davis, Mark	Active	70	Designation Mark Ex Reset Password
		Evans, Adrian	Active	40	Designation Mark Ex Reset Password
		Fagan, Laurie	Active	70	Designation Mark Ex Reset Password
		Farnsworth, Frank	Active	30	Designation Mark Ex Reset Password
		Faulkner, Ken	Active	70	Designation Mark Ex Reset Password
		Ferguson, Sarah	Active	70	Designation Mark Ex Reset Password

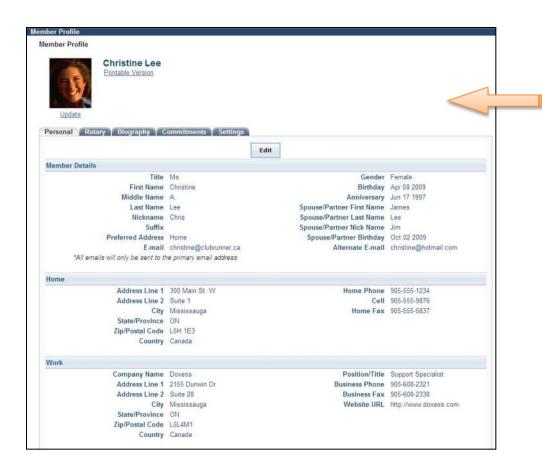
Total Members: 110 (106 Active + 3 Honorary + 1 Corporate)

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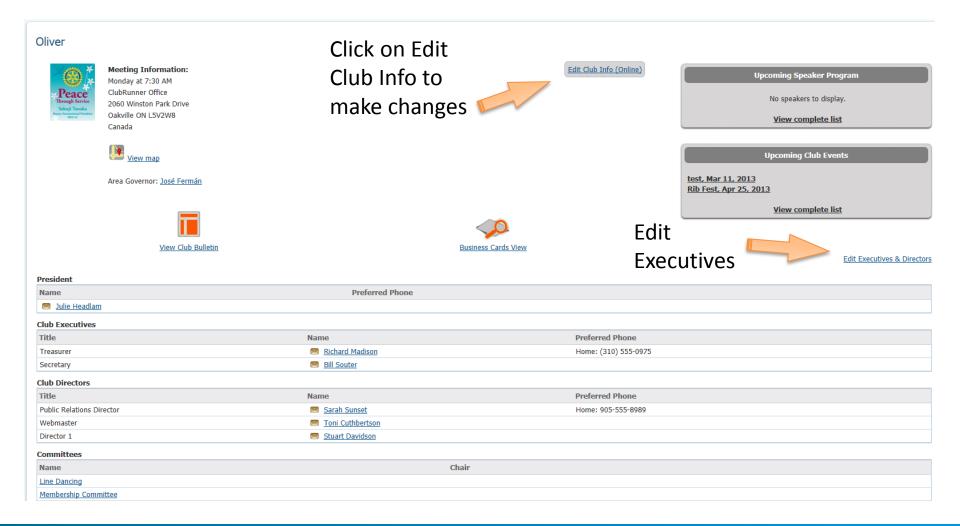
Add New

Member Profile



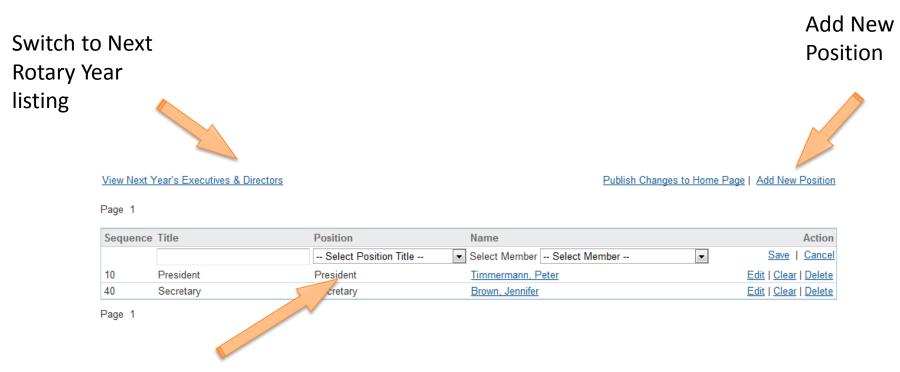
Click on various tabs to access more information.

Edit Club Information



ClubRunner

Edit Club Executives



When adding a position, select the closest match under Position. This will ensure this person receives district communications relevant to their title.

ClubRunner

Club Attendance Report

Number of Members refers to final count as of end of month

			Fill in the numbers				
onthly Attendance of Oliv	er				Enter Pre	vious Year Attendanc	
	Number of Members	New Members	Terminated Members	Number of Meetings	Attendance Per	Attendance Percentage	
July 2012	23	2	2	2	2	%	
August 2012	56	5	2	4	60	%	
September 2012	45	2	0	4	89	%	
October 2012	0	0	0	0	0	%	
November 2012	0	0	0	0	0	%	
December 2012	0	0	0	0	0	%	
January 2013	0	0	0	0	0	%	
February 2013	0	0	0	0	0	%	
			Save			hen	
					р	ress Sav	

As of 3rd week of month, new line appears

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Rotary Integration

Opt-in must be done in two places: RI and ClubRunner



RI Database Integration

We are pleased to announce that RI Database Integration is now available on ClubRunner! This new feature will automatically update member records at Rotary International Headquarters within 2 hours of being updated on ClubRunner, using API integration. For help information click here.

In order to begin using this feature, there are two steps that need to be completed by your club:



1. Opt in at Rotary International's Member Portal. Login as a club officer and look for the Partner Organization link. Select ClubRunner as your authorized partner and follow the steps outlined within that page to agree to the terms and conditions. Here is a direct link to that page:

http://www.rotary.org/en/secureselfservice/Pages/AddVendorOrganization.aspx

2. Opt in by selecting the checkbox below. Note that once you do this, ClubRunner will begin to transmit your member information updates to Rotary International as soon as any changes are made to your active members' profiles, whether the change was made by the member or a club executive.

2) Checkbox to opt in

Switch on Data Integration between ClubRunner and RI for all active member records within my club.

Note that all members will now be set to opt into the fields the club has selected below. Any members who wish to opt out of specific fields can update their preferences under the Privacy tab of their profile.

I agree to the <u>Terms and Conditions</u> of this integration.

Integration confirmed on 22/03/2011 4:06:30 PM EST by Sarah Sunset

Customize fields privacy

Choose Club RI Integration Privacy

 Allow Name
 Image: Allow Home Address

 Allow Home Address
 Image: Allow Cell Phone

 Allow Business Address
 Image: Allow Business Phone

 Allow Business Address
 Allow Business Phone

 Allow Business Address
 Allow Business Phone

 Allow Business Address
 Allow Business Phone

 Image: Allow Business Address
 Image: Allow Business Fax

 Image: Allow Primary Email
 Image: Allow Primary Email







Privacy

- No personal information or email address ever exposed on public website
- Member's access to information is restricted based on his or her role in the District or Club
- Strict Privacy Policy assures you that ClubRunner will not release data to third party in any form
- Member can customize privacy level based on fields
- Read our <u>Privacy Policy</u>



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Club Version of ClubRunner

- Not a requirement to participate in updating District communication intranet
- Provides your club with your own website and portal
- Club-level directories, email and document management
- Higher detail of attendance tracking
- Event management
- Dues & billing (sending out invoices, not accounting)
- Branded Club newsletter
- Database integrated with District and Rotary International

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• More info at <u>www.clubrunner.ca</u>

Support and Help Guides

ClubRunner Contacts & Resources

Subscriber Community Portal <u>community.clubrunner.ca</u>

On Demand Video Tutorials <u>www.clubrunner.ca/videos</u>

Webinar Training www.clubrunner.ca/webtraining

eSupport Center www.ClubRunnerSupport.com



Email ClubRunner Support at:

support@clubrunner.ca

