

BEING THE BEST
SECRETARY
YOU CAN BE

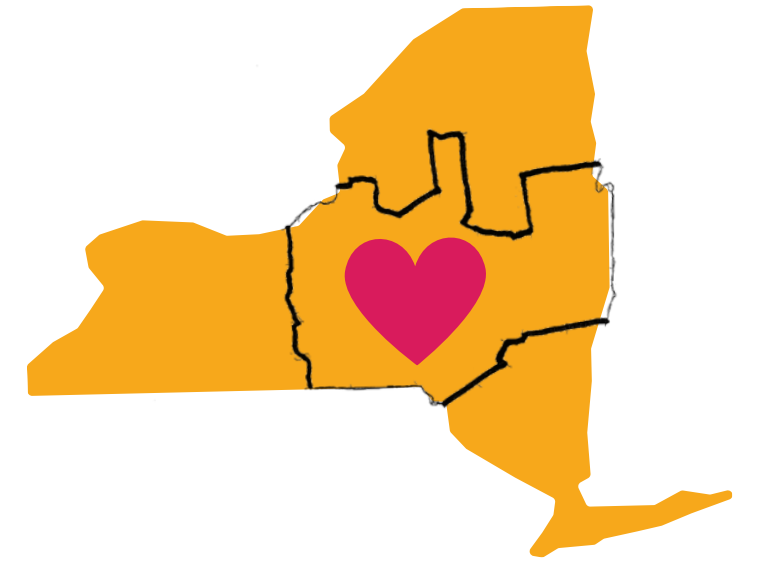
DLA Session | March 7, 2026





Lizzy Martin

CNY Rotary President 2024-25



Secretary Experience

Take Your Kid to Work Day - Peter's Furniture, Owego, NY

SUNY Oswego Bachelor's Degree

18 years at Advance Media New York - Advertising Professional

Baldwinsville Rotary Secretary 2008-2023



Today's Agenda

- Overview of necessary tasks
- Review additional ways to help
- Access important tools
- Discuss more ways to be excellent

Secretary Duties

- Data entry
- Data storage
- Data sharing



What is ClubRunner?

- The system our district (and many clubs) use to:
 - Manage our membership records
 - Publish our website
 - Email with members
 - Create newsletters called Bulletins
 - and more!
- ClubRunner is based out of Canada and owned by a Rotary family

How to Access ClubRunner

- If your club has its own subscription, go to your club's website
- If your club does not, go to CNYRotary.org



- Your log-in credentials are created when you were put into the system
- For help, contact our [CNY ClubRunner Support Team](#)
 - CNYRotary.org > Club Resources > Admin Support > ClubRunner Support

Data Entry

Data Entry

MEETING INFORMATION

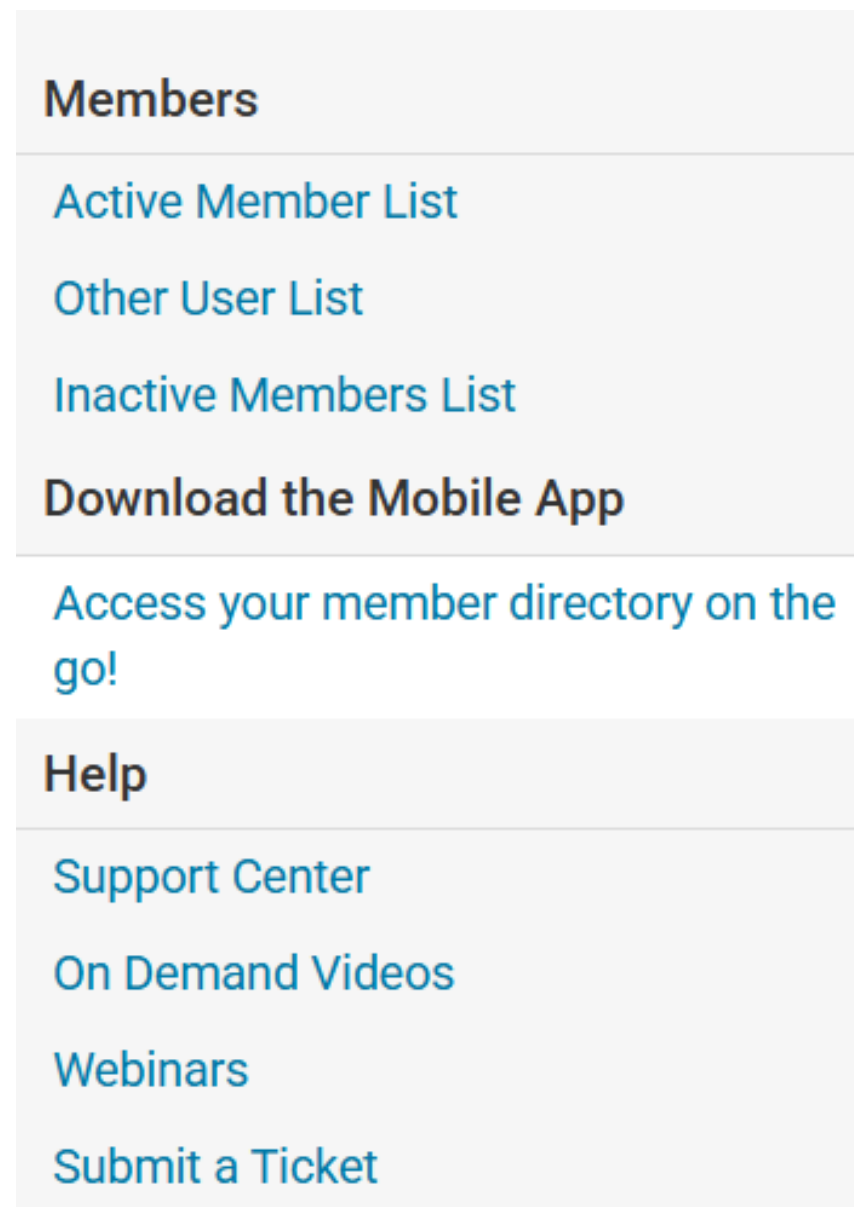
Thursdays at 12:00 PM

📍 Mid York Library System
1600 Lincoln Ave.
Utica, NY 13502
United States of America

We meet at noon in person and virtually via Zoom the 1st Thursday of the month for program meetings; the 2nd Thursday and/or weekend for service projects; and the 4th Thursday for an after-hours social hour.

- Maintain membership records in ClubRunner
- Input club executives in ClubRunner
- Keep club information up to date in ClubRunner

Membership Records



- Only ever update in ClubRunner
 - Automatically feeds information to Rotary
 - Must address synchronization issues that can occasionally happen
- Enter new members within 30 days
- Remove terminated members before June 30 and Dec 31 to ensure accurate dues invoices

Data Entry

Club Executives

Club Executives and Directors

« Previous Year | 2025 - 26 | Next Year »

Drag and drop positions to change their sequence

? Carry Over Next Year + Add New Position

Title	Position	Name	Actions
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- Enter club leaders as soon as possible
- CNY and Rotary use this data to send important communications about learning events and more

Data Entry

Club Information

- Keep the information about your club's meeting time and location up to date
- What you put in here

Rotary Club of Baldwinsville

 **Change**

President: [Katie Reap](#)
member(s): 65 active, 3 honorary

Meetings: Tuesdays at 7:00 p.m.
The Wood Golf & Country Club
[View map](#)

Data Entry

Club Information

CLUB DIRECTORY & CONTACTS

is what shows up here!

[View Map of All Clubs](#)

Display records

Website	Club Name ^	Club ID	President	Location	Meeting Day & Time
	Adirondack Foothills (Barneveld)	4825	Melissa Enos , Jeff Hazard	The Remsen Depot	Wednesdays at 6:15 p.m.
	Albany Rotary	4907	Rafael Campiz	American Legion Post#1520 Join Us Online	Wednesdays at 12:00 p.m.
	Amsterdam	4909	Morgan McClary	Raindancer Steak Parlor	Wednesdays at 12:15 p.m.

Data Entry



Let's visit ClubRunner



Download the FREE ClubRunner App

Put the Club Directory in
your pocket!



- Access your member contact info on the go
- Connect with CNY leaders
- Find other clubs
- Easily edit your profile
- View your data, like Foundation giving



Data Storage

- Keep the minutes for board meetings
 - Optionally for your club meetings
- Maintain email list of club members for communications
- Store any other important documents
 - Historical documents
 - Bylaws
 - Conflict resolution documents

Where to Store it?

- Use a file storage service like Google Drive or DropBox
- Store on your OneDrive or in a Cloud so they are backed up
- Documents can be stored in ClubRunner if your club has a subscription
- Avoid your desktop
- Aim for something multiple leaders can access

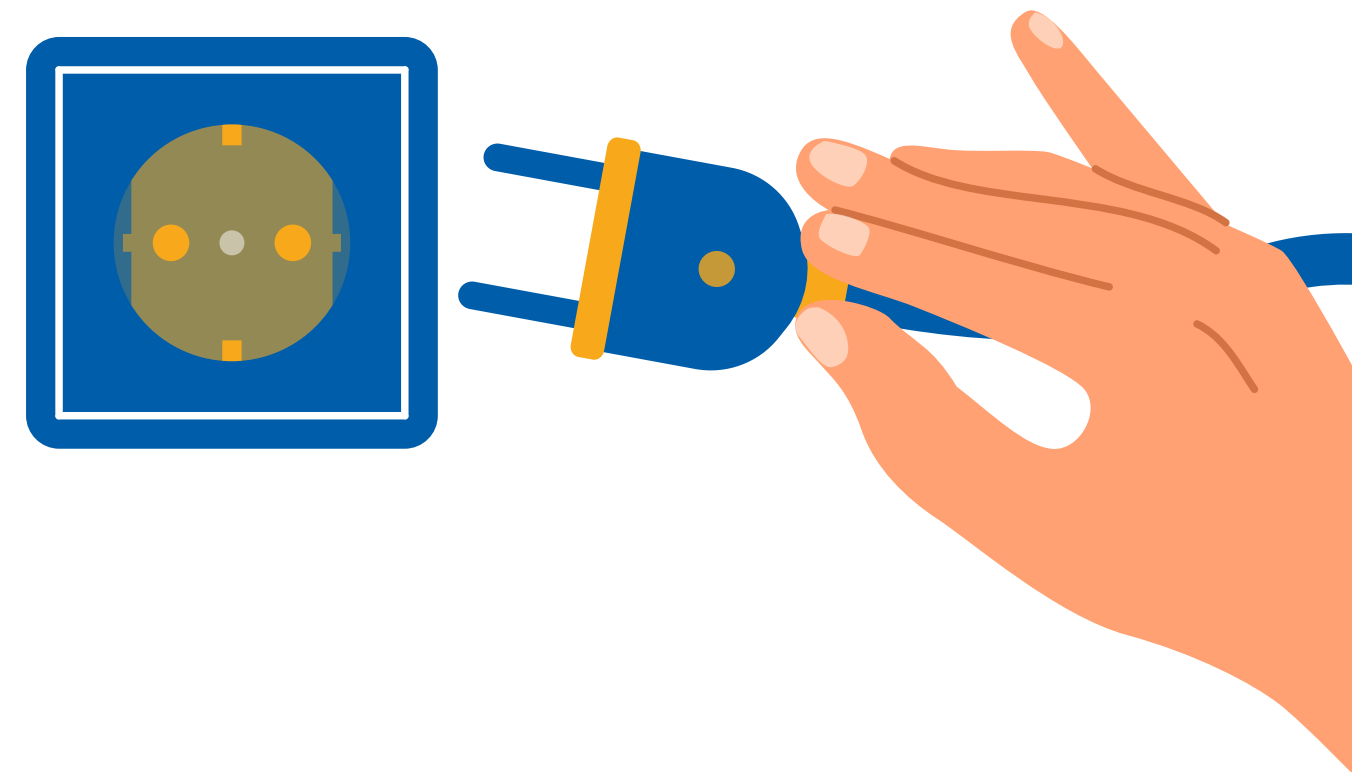
Data Sharing

- Communicate with club members
 - Approved minutes
 - Member applications for review
 - More?



Weekly Communications

- An informed club is an engaged club
- Highlight upcoming events
- Recruit volunteers
- Share important news about members
- Pass along Area and CNY news



Data Sharing

More Ways to Help

- Maintain forms, like member applications
- Help members access ClubRunner and My Rotary
- Improve the data in the database
 - Update member profiles with photos and details
- Coordinate with treasurer to send dues invoices
- Be an active voice on your club's board

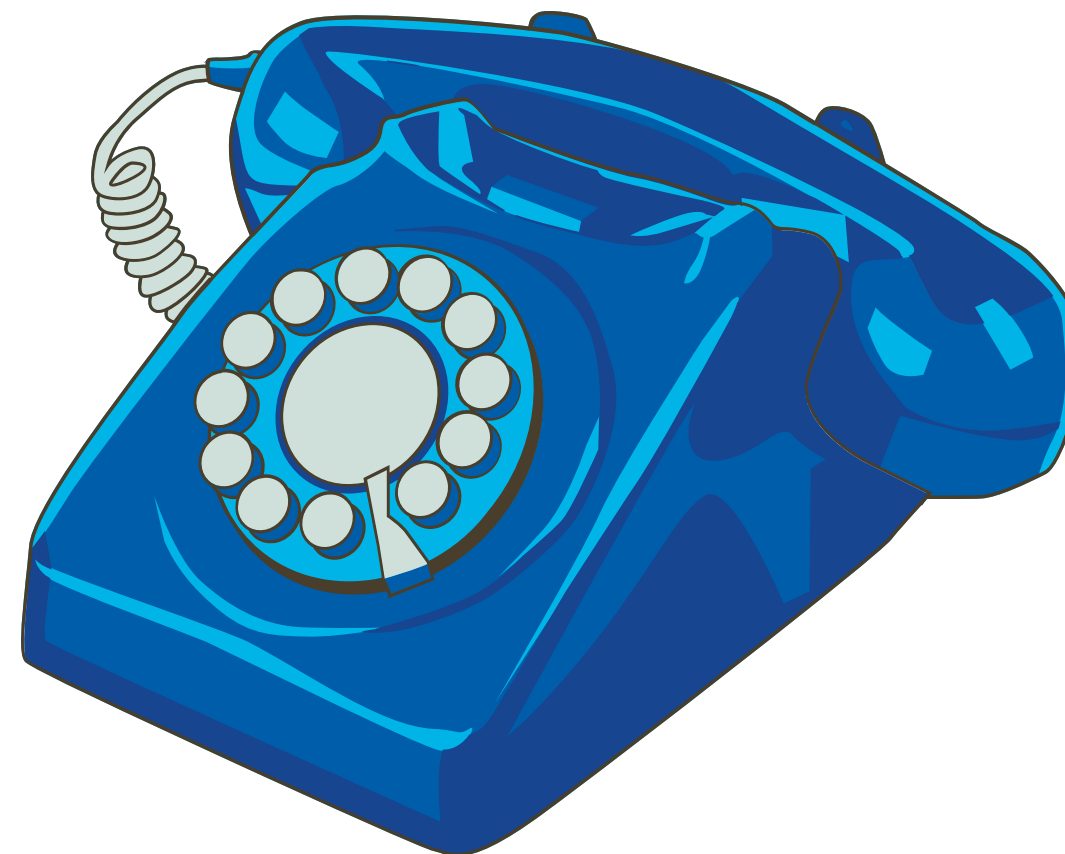
Important Tools



- ClubRunner
- My Rotary
- The Learning Center
- Google Drive or OneDrive
- Email
- Zoom
- Canva

Local Resources

- CNYRotary.org [Admin Support Page](#)
- ClubRunner Knowledge Base - clubrunnersupport.com
- District Secretary Dana Jerrard, jerrarddana@gmail.com
- ClubRunner Support Team
- Your Area Rep
- Me!



what else?