



**CREATE HOPE
in the WORLD**

CLUB SECRETARY

Spring Training April 2023

As club secretary, you have an important role in helping your club run smoothly and effectively

DUTIES

Maintain Records and Reporting:

1. Membership – new, terminating, updates
2. Calendar of club and District activities
3. Meetings
 - Meeting notices
 - Agendas
 - Minutes (written minutes provided to members within 60 days of meeting)
4. Club Records (keep a folder and retain for 7 years)
 - Constitution, By-Laws
 - Correspondence
 - Preserve historical records

Reporting – rotaryd5000.org

1. Attendance by the 15th of the next month, if applicable
2. Membership Changes - within 2 weeks
3. Officers and Chairs – by January 31 for incoming officers
4. Club Info – Changes in meeting days/time/location

Tasks

- Learning – District training, Learning Center
- Transition - Meet with the outgoing secretary and receive club records
- Meet with the incoming club officers or board of directors to plan the year
- Create a My Rotary account on Rotary.org, if you don't have one
- Update your club's records and member list on My Rotary, or through your club management system
- Make sure the club treasurer has the club invoices, due in July and January
- Take minutes at club and board meetings and club assemblies
- Update club and officer information for the Official Directory and Rotary's records
- Manage club correspondence, including responding to emails and sending official notices and invitations
- Keep promotional items, name badges, and other materials used at meetings and events
- Submit monthly attendance reports to your governor; if your club doesn't track attendance, let your governor know
- Preserve your club's historical records
- Write an annual report for the club at the end of the Rotary year
- Assist the club president, treasurer, and committees as needed
- Meet with your successor and hand over club records

Calendar

- Club Calendar
 - Meeting dates
 - Dark days
 - Assemblies (3/yr)
 - Events, projects
- District Calendar

| 2023-2024 CLUB PLANNING CALENDAR (subject to change) | |
|---|--|
| May-June 2023 5/6, 9-11am-Board Workshop 5/14, 6pm- PE Meeting 5/19-21 District Conference in Hilo 5/27 RI International Convention in Melbourne Club Assembly to plan upcoming year Prepare budgets (Approve by July) Send out dues invoice/Update mbr rosters 6/12, 7pm-Transition Workshop 6/15-District Grant Application due | December - Disease Prevention and Treatment 2nd, 9-10am-Rotary 101 4th, 7pm-President Elect Training 13th, 6pm Presidents Forum Club Elections by Dec 31 President 2023-24 elected by Dec 31 Update membership roster & Send out invoice |
| July 2023 - Maternal & Child Health Month 1st, TBD- D5000 Change of Command Celebration 12th, 7pm- Presidents Forum 15th, 9-11am-Membership Chairs & Board Officer/Board Installations Pay RI and District Dues by July 31 Pay HRYF Dues by July 31, submit rep list DG Visits | January 2024- Vocational Service Month 13th, 9-Noon- Presidents' Mid-Year Forum 15th & 22nd, 7pm-Pre-PETS 27th, 9-10am-Pre-PETS Update Incoming Board in ClubRunner Pay RI and District Dues by Jan 31 31st-2024-2025 Grant Qualification PE Docs |
| August -Membership and New Club Development 9th, 7pm- Presidents Forum 12th, 10-11am-Youth Protection Certification 15th - Rotaract & Interact Citations due to RI 26th, 9-10am Social Media/Public Image 101 DG Visits with Club Nominations for DG open | February - Peacebuilding & Conflict Prevention 1st HRYF apps due to club 2 to 4 - Southwest PETS in Los Angeles 10th Membership Committee Workshop 17th HRYF club interviews completed 21st, 6pm - President Forum 23rd-Rotary's Anniversary 24th, 9-10:30am- Board Workshop |
| September - Basic Education and Literacy Month 1-30 Give Alpha donations to HRYF 5th, 7pm - President Elect Meeting 13th, 7pm - Presidents Forum 9th-Fall Seminars - Foundation & Grants 23rd, 9-10am-International Svc, Global Grants 23rd, 10-11:30am-Foundation & PolioPlus Plan | March - Water, Sanitation & Hygiene Month 4th, 7pm - President Elect Training 13th, 6pm-Presidents Forum 23rd, 9-11am Club Action Plan Workshop 23rd, 11-Noon-President & PEs Transition Plan |
| October - Community & Economic Development 2nd, 7pm-President Elect Training 7th, 9-10am-Rotary 101 11th, 7pm- Presidents Forum 21st, 9-10:30am-Board Training - Elections 24th - World Polio Day | April - Environment Month 1st, 7pm-President Elect Training 6th&13th, 9am-Noon Spring Training Assembly 10th, 6pm-Presidents Forum 1st & 8th Spring Training Assembly 27th - Rotarians at Work Day Project |
| November - The Rotary Foundation Month 6th, 7pm-President Elect Training 8th, 6pm- Presidents Forum 9th-12th-Zone Institute San Diego 15th - IRS Tax filing deadline 25th - Rotary Gives Thanks Day | May - Youth Service Month 4th, 9-11am-Leadership 101 6th, 7pm-President Elect Training 10-12, District Conference on Kauai Final Grant Reports due by May 31 25-29 RI Convention in Singapore |
| | June - Rotary Fellowship Month 10th, 7pm-Presidents & PEs Transition Meeting 8th, 9-11am-Incoming Board Transition wkshop Assembly conducted by PE -next year plan |

Club Meetings (Rotary requirements)

(c) Change of Meeting. For good cause, the board may change a regular meeting to any day between the preceding and following regular meetings, to a different time of the regular day, or to a different place.

(d) Cancellation. The board may cancel a regular meeting for these reasons: (1) a holiday, or during a week that includes a holiday; (2) in observance of the death of a member; (3) an epidemic or a disaster that affects the whole community; or (4) an armed conflict in the community. The board may cancel up to four regular meetings a year for causes not listed here, but **may not cancel more than three consecutive meetings.**

Annual Meeting by December 31 (Rotary requirements)

Section 2 — Annual Meeting.

An annual meeting to elect officers and present a mid-year report, including current year income and expenses, together with a financial report on the previous year, shall be held before 31 December, as provided in the bylaws.

Section 3 — Board Meetings. Within 60 days after all board meetings, written minutes should be available to all members.

- District – rotaryd5000.org
- Rotary International – rotary.org

District Uses ClubRunner

- District 5000 uses ClubRunner's program for the website.
- Clubs do not need to use ClubRunner for their own websites, however, if clubs are using ClubRunner, the club's information uploads to the District's website when integrated.
- If your club does not have a website or uses another web designer, input the member information and officer list on the District's website.
- ClubRunner has recorded and live webinars available to learn how to utilize the website features at: clubrunner.helpserve.com. You can also click on the "Help" button and go to the Support Center or On Demand Demos to help -you find information on maneuvering the website. You can also call them in the morning (they're in Canada) at 1877-469-2582.
- If your club is interest in updating your ClubRunner website with the new RI branding or want an almost turn-key ClubRunner website, give them a call and they will be happy to help.

Download the ClubRunner App to your phone from the App Store

- The ClubRunner Mobile App is your key to connect to your ClubRunner website on the go! Free to download and use, this app will let you access the key info you need while you're on the go. Password protected just like your website, the ClubRunner Mobile app allows you to view your member directory, contact your members and executives, read the latest articles posted to your website, and even learn more about your upcoming events and speakers, right from your smartphone or tablet!
- To download the app from the Apple App Store or from Google Play, simply type in 'ClubRunner' in the search bar. The mobile app is compatible with all versions of the iPhone, iPad and iPod Touch sets that have iOS 8.0 or later and with versions of Androids that are 4.0.3 or better.

What you can find on the district website:

- Membership rosters
- District dues invoice template
- District Chairs and Org Chart
- Information on the Avenues of Service
- Club Presidents and Meeting Locations
- Events in the Calendar
- Register for Events
- Look for Rotarians in the Doing Business Directory or Yellow Pages

District Website: rotaryd5000.org (ClubRunner)

Membership Information:

- Add or terminate members
- Update Member Profiles
- Identify Officers and Club Chairs

Membership information uploads to Rotary International automatically (sometimes there is a time delay.)

Important to have the correct address and email address.

Log in to rotaryd5000.org District's website. Click on Member Login

rotaryd5000.org

[Home](#) [Who We Are](#) [What We Do](#) [News & Updates](#) [Club Resources](#) [Get Involved!](#)

[Member Login](#)

Welcome to Rotary in Hawai'i. Join us in Making a Difference in our Communities



Hawai'i
Rotary
District 5000

Zone 26 2021-22 Best District Website

Hawai'i Rotary District 5000 Membership Statistics

Rotary Clubs: **53**
Members: **1515**
Since July 1, 2022: **129** Active Members Added | **111** Members Terminated
As of Jan. 2023 from Rotary Club Central.

Member Area

For First Time users or if you forgot your password, click on the “New user? or Forgot password?”, an email will be sent to the address in the profile. Follow the instructions in the email. Make sure the email address is correct.

District 5000

ClubRunner

Enter your login information below:

Login Name [Forgot login name?](#)

Password [Forgot password?](#)

☐ Keep me logged in [New user?](#)

Login

© 2002-2020 ClubRunner. All rights reserved.
[Privacy Statement](#) | [Online Help](#) | [System Requirements](#)

After Logging In, click on "Member Area" to get to Admin Sitepages

The screenshot shows the Rotary District 5000 website. The top navigation bar includes links for Home, Who We Are, What We Do, News & Updates, Club Resources, and a Get Involved button. A blue arrow points to the Member Area link in the top right corner. Below the main banner, a second navigation bar contains links for Admin, For Clubs, Grants, For Members, Membership, Contacts, Organization, Communication, Website, New Website (Beta), Documents, Reports, Attendance, Events, New Bulletin (Beta), Donations (Beta), and Help. A blue arrow points to the For Clubs link. The For Clubs sub-menu is open, showing links for Membership Lists, Define Club Executives, Edit Club Information, RI Integration, Missing RI Member ID, Club Attendance Report, RI Member Synchronization, Executive Compare and Synchronize, and Member Updates Archive. A blue arrow points to the Membership Lists link. The Membership Lists page is displayed, showing the Active Members List. The page includes a dropdown for Select Club (West Honolulu, Oahu), a Members per Page selector (25), and a list of members with columns for Email, Name, Type, Access, and Action. A blue arrow points to the Add New Member button.

Welcome to Rotary in Hawai'i. Join us in Making a Difference in our Communities

Hawai'i Rotary District 5000

Home Who We Are What We Do News & Updates Club Resources Get Involved

Welcome, Naomi [Logout] Admin Home Page

Admin For Clubs Grants For Members Membership Contacts Organization Communication Website New Website (Beta) Documents Reports Attendance Events New Bulletin (Beta) Donations (Beta) Help

Membership Lists Define Club Executives Edit Club Information RI Integration Missing RI Member ID Club Attendance Report RI Member Synchronization Executive Compare and Synchronize Member Updates Archive

Club Updates Archive

Members

- Active Member List
- Other User List
- Inactive Members List

Report Updates

- Define Club Executives
- RI Integration
- Monthly Club Attendance

Active Members List

Select Club: West Honolulu, Oahu

Members per Page: 25

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Transfer New Member Add New Member

| Email | <input type="checkbox"/> By First Name | Name | Type | Access | Action |
|--------------------|--|--------------------|----------|--------|--|
| Ane, Edward | | Ane, Edward | Honorary | 70 | Designation Change Status Reset Password |
| Au, Gordon | | Au, Gordon | Active | 70 | Designation Change Status Reset Password |
| August, Jr, Manuel | | August, Jr, Manuel | Active | 70 | Designation Change Status Reset Password |

To Add a Member:
Click on "For Clubs",
"Membership Lists",
"Add New Member"

Membership Types

- The RI Bylaws and Standard Rotary Club Constitution provide for two types of membership: active and honorary. Only Active members can hold office and vote on Rotary matters.
- By amending the By-Laws, clubs may offer additional membership types such as:
 - Associate (no dues, no benefits of an Active member)
 - Corporate (membership in the individual's name, not the entity)
 - Family membership (can be Active member with reduce dues)
- Clubs and districts set their own policies about these members' other financial obligations (club and district dues, meal costs, etc.), attendance requirements, and service expectations and reflect these policies in their bylaws
- Note: Find the recommended Constitution and By-Laws at rotary.org and type Document Center in the search box.

Tips - Membership Rosters

- 1) Keep your roster up to date. RI will prepare invoices as of July 1 and January 1 and you are not able to adjust that number. If terminating any membership, best to do it by June 15 and Dec 15. Suggest sending the club invoices out no later than June 1 and December 1, with payment due dates of July 1 and January 1.
- 2) New members added after the RI invoice date will be prorated for dues at the RI next billing.
- 3) If adding a Rotarian, make sure you keep their same Rotary ID number to preserve their Paul Harris point history. You can add them to your roster from the RI website by doing a search from the Club Administration, Club & Member Data area. Click on “Add, edit or remove members” and then: [Search for an existing member](#). Or, from **ClubRunner**, click on **Transfer New Member**.
- 4) Periodically, perform a synchronization from ClubRunner by clicking on “[RI Member Synchronization](#)”. This action compares the ClubRunner roster with the RI roster and lists those who are not on the RI website and also those on the RI website, but not in ClubRunner. Click on the link to add them to the site that is missing the listing. If you find a member with 2 RI numbers, they need to call RI to consolidate the profiles.
1 866-976-8279 (toll free)
- 5) Ensure that the name on the RI records is exactly the same as ClubRunner’s records.

To Update Member Information

Click on “For Members”, then “Edit My Profile”

The screenshot shows the Rotary District 5000 ClubRunner website. The browser address bar displays rotaryd5000.org. The website header includes the ClubRunner logo and the text "District 5000". A navigation bar contains links: Admin, For Clubs, Grants, **For Members** (highlighted with a blue arrow), Membership, Organization, Communication, Website, Reports, Attendance, Events 2.0, and Help. Below the navigation bar, a sub-menu for "For Members" is visible, with "Edit My Profile" highlighted by a blue arrow. The main content area is titled "Administration" and contains three columns of links. The first column, "Home Page Editing", includes links like "Home Page Stories", "Story Management", and "Edit Home Page Links". The second column, "District, Clubs & Membership", includes links like "District Dashboard", "Club & Membership Detail", and "Member Detail". The third column, "For Members", includes links like "Edit My Profile", "Change My Password", and "District Directories (Old Version)". The Rotary logo is visible in the bottom left corner.

ClubRunner™ Connect. Collaborate. Communicate.

District 5000

Welcome, Naomi [Logout] | Admin | Home Page | A A A

Admin | For Clubs | Grants | **For Members** | Membership | Organization | Communication | Website | Reports | Attendance | Events 2.0 | Help

Edit My Profile | Change My Password | My Committees

Administration

Home Page Editing

- [Home Page Stories](#)
- [Story Management](#)
- [Edit Home Page Links](#)
- [Download Files](#)
- [Site Pages Management](#)
- [Photo Albums Management](#)
- [Documents Download](#)
- [Website Sponsoring Area](#)
- [Website Sponsoring Guide](#)
- [Website Designer 3.0](#)
- [Edit Meta Tags](#) **NEW!**
- [Edit Favicon Logo](#)
- [Image Library](#)
- [Google Analytics](#) **NEW!**

District, Clubs & Membership

- [District Dashboard](#)
- [Club & Membership Detail](#)
- [Member Detail](#)
- [Request Member Updates](#)
- [Member Access Rights](#)
- [Clubs Attendance Management](#)
- [Edit Executives and Directors](#)
- [Download Member Data](#)
- [Member Data Changes](#)
- [RI Reporting](#)
- [Reports](#)
- [Member Designations](#)
- [District eDirectory Builder 2.0](#)

For Members

- [Edit My Profile](#)
- [Change My Password](#)
- [District Directories \(Old Version\)](#)
- [District Directories \(New Version\)](#)

Rotary

Member Profile

- Click “Edit” and enter information
- To download a picture, click on “Update” under the silhouette
- The primary email address will be used for emails.
- Check other tabs for other categories to edit.
- Change passwords in the “Settings” tab.
- Opt in or out in the “Privacy” tab
- Don’t forget to click on “Save” at the bottom.

Click on “Define Club Executives”

Click on “Next Year” to list your officers. Use the “Add New Positions” to add lines.

District 5000

Welcome, Naomi Masuno [Logout] Home English ▾

Admin For Clubs For Members Membership Contacts Organization Communication Website Documents Reports Attendance Events Bulletin Donations Help

Membership Lists **Define Club Executives** Edit Club Information RI Integration (New) Missing RI Member ID Club Attendance Report Member Updates Archive Officer Updates Archive Executive Compare & Synchronize RI Member Synchronization

Club Executives and Directors Ala Moana Oahu

Club: Ala Moana Oahu Refresh

« Previous Year | 2022 - 23 | Next Year »

Drag and drop positions to change their sequence

Carry Over Next Year Add New Position

| Title | Position | Name | Actions |
|-------------------|---------------------|----------------|-----------------------|
| President | President | Sue Ann Lee | Edit Clear Delete |
| President Elect | President Elect | David Arita | Edit Clear Delete |
| Treasurer | Club Administration | Thomas Riley | Edit Clear Delete |
| Community Service | Community Service | Lani Paet | Edit Clear Delete |
| Secretary | Secretary | Mary Ann Berry | Edit Clear Delete |

Tip: If “Carry over Next Year” is highlighted, click on it and all the positions will carry to the next year!

New Officers: Elected by December 31. Nominations 30 days Before

ELECTIONS. Review your Constitution and By-Laws

The annual meeting for the election of officers should be held no later than December 31st. Elect officers, including the President-Elect and Club Trainer. The President for 2023-2024 was elected last year and is the current P.E.

Input the elected officer names on the district website by January 31. Information uploads to the RI website.

Attendance Policy is Dictated by the Club By-Laws

The RI Council on Legislation granted clubs greater flexibility on attendance policies. • Rotary clubs now have the option of reducing their meeting frequency as long as they meet in some way at least twice per month. Allowable options:

- Determine the best day and time for their meetings
- Change or cancel a meeting, if the need arises
- Count service projects or social events as meetings
- Choose whether to gather in-person, meet online, alternate between online and in-person meetings, or even use both formats at the same time (hybrid)

Attendance (refer to Club Constitution)

Make-Ups (new - anytime within the same Rotary year) :

- attends at least 60 percent of the regular meeting of another club
- 30 minutes of a e-club “meeting”
- attends a meeting of a Rotaract or Interact club, Rotary Community Corps, Rotary Fellowship
- attends a RI convention, an international assembly
- Rotary district conference, a Rotary district training assembly, any district meeting
- participates in a club service project or a club-sponsored community event
- attends a board meeting or a service committee

Can exclude from attendance:

“Rule of 85” Rotarians can be excused from attendance if two conditions are met: They have been a member of one or more Rotary clubs for at least 20 years, and their years of club membership plus their age equals at least 85

President & Office Resource Site Page and Training Library

Find this link on right side of the Home Page. There's a calendar for important dates and the miscellaneous information is posted here. i.e. Powerpoints from seminars, etc. Check out the Training Library too!

Rotary
District 5000
Hawaii

Home Our District ▾ Our Islands, Our Clubs ▾ Membership ▾ Foundation and Grants ▾ Polio ▾ Our Service ▾

Calendar, Yellow Pages ▾ Rotary Doing Business ▾ **Training Library** Contact Us Join Us!

DISTRICT CALENDAR

Spring Training Webinars
Apr 10, 2021
9:00 AM – 12:00 PM

High Schoolers and Toastmasters
Apr 10, 2021
2:00 PM – 3:30 PM

Spring Training Webinars
Apr 17, 2021
9:00 AM – 12:00 PM

District Environment Focus Group
Apr 20, 2021
6:00 PM – 7:00 PM

Welcome to Rotary in Hawaii
Making a Difference in our Communities

RUSSELL-HAMPTON CO.
Quality Lapel Pins

QUICK LINKS

District Links

- District Conference
- Club Awards & Recognitions
- Rotary Doing Business
- D5000 Webinar Recordings
- President & Officer Resources**
- Leadership Academy

RI Website: rotary.org/myrotary

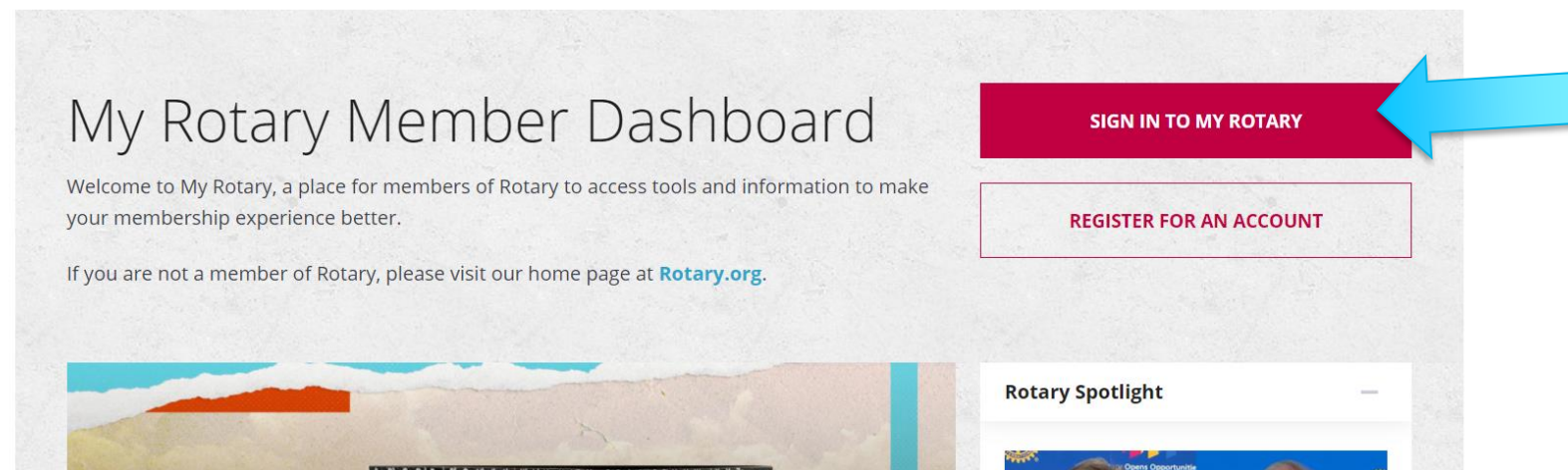
- Rotary Club Central Goals
- Sign up for Newsletters
- Get Membership and Foundation Reports
- Find Projects and Ideas
- Download Manuals, Documents
- Find Global Rewards (Discounts for Rotarians)

rotary.org - Sign In

Sign in with your email address and password. “Register for an Account”, if you have never signed in or if you have entered the wrong sign-in info too many times. The User Name or Login password may be different from District’s website password. Email address is from the District’s website, unless you change it for RI. If your email address changes, RI’s website needs to be updated separately.

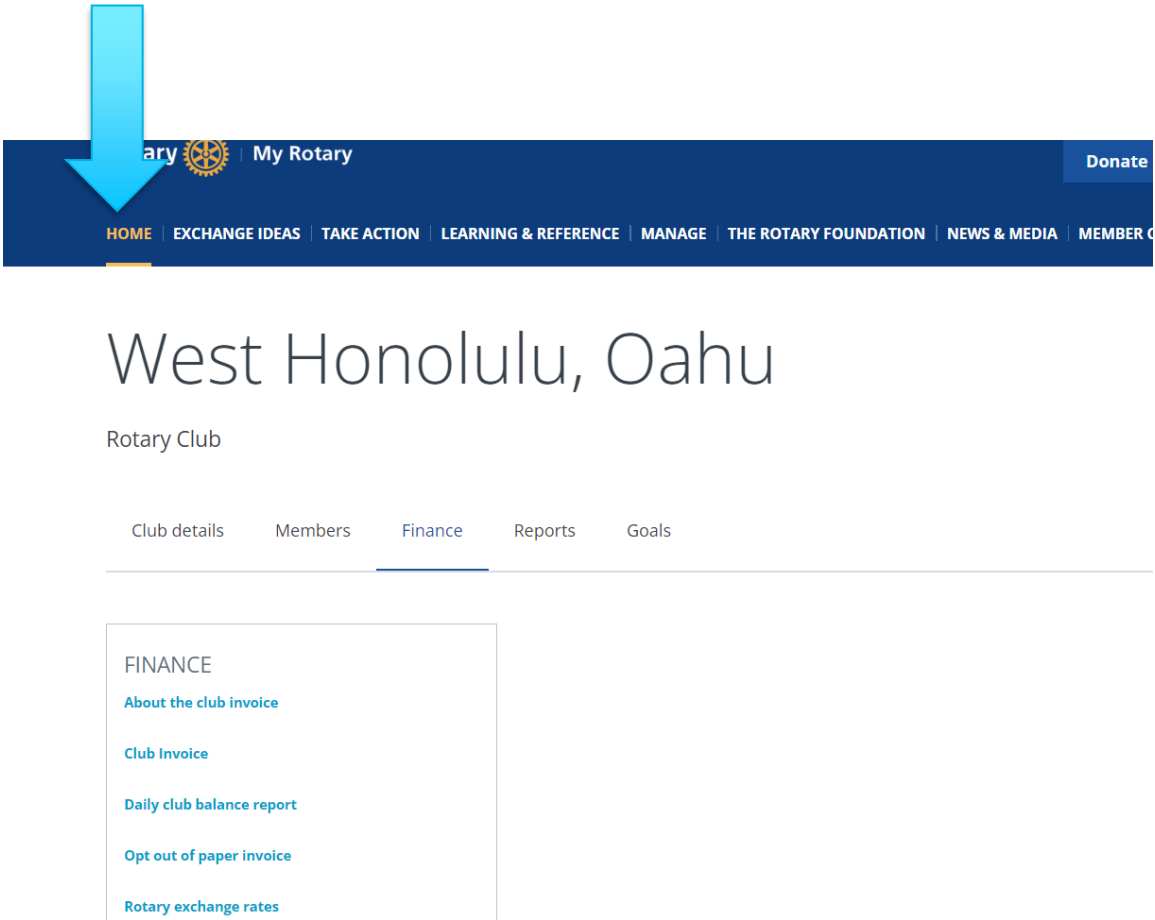


My Rotary



Click on “Manage”

Go to Manage and then “Club Administration” for Dues Invoice or Member Data.
Or Go to Home and “Reports”




Rotary Learning Center

Take online courses
for club secretary in
the [Learning Center](#)
at learn.rotary.org

Club Secretary Basics





Search content in the platform

ck Course Catalogs > My Courses and Learning Plans > Club Secretary Basics



About this Learning Plan

Learn about your role as club secretary, how to work with club leaders, and how to manage your club's members



Updated: July 2022





Getting Started With the Learning Center
How can the Learning Center help you? In this course, you'll discover its many features and how to use them.
E-Learning | Duration: 15m





Get Ready: Club Secretary
Learn about your role as a Rotary or Rotaract club secretary, the resources that are available to you, and how to get started.
E-Learning | Duration: 15m



Managing Club Business
As president, secretary, treasurer, or club committee chair, you're charged with managing the club's business. This course provides the tools you need to do so effectively.
E-Learning | Duration: 30m



Working With Your Club Leadership Team
Learn how you can work with other club leaders to plan activities, structure committees, and more.
E-Learning | Duration: 30m



Minimizing Risk
As a club or district leader, learn what you need to know to reduce risk and use resources effectively.
E-Learning | Duration: 15m

Minutes

- **Club Assemblies**
- **Board Meetings**
- **District Governor/AG visits**
- **Committee Meetings**



Reporting

Semi Annual Report



CLUB INVOICE — JANUARY 2017

INVOICE NUMBER INV-0000158198
CLUB NUMBER C000030592
ROTARY CLUB OF Upcountry Maui
DISTRICT 5000
INVOICE DATE 01-01-2017

Rotary Club of Upcountry Maui
Rotary Club, P.O. Box 880833
Pukalani, HI, 96788
United States

JAN-JUN CHARGES

| QUANTITY | UNIT OF MEASURE | DESCRIPTION |
|----------|-----------------|-------------------------------|
| 28 | Members | RI Per Capita Dues |
| 5 | Months | RI Pro Rata Dues |
| 28 | Subscriptions | The Rotarian Magazine - Paper |
| 4 | Subscriptions | The Rotarian - Paper Pro Rata |

Deadline for submitting
accurate attendance:
Dec 31st and June 30th
(best site to file: My Rotary)

NOTIFICATIONS

Visit www.rotary.org/exchange-rates for
the current RI Monthly Exchange Rate.
Want to go paperless? Opt your club
out of the paper invoice in My Rotary
under Edit invoice preferences.

QUESTIONS?

Contact : Gloria Spanitz
T: 847/866-3484
E: Gloria.Spanitz@rotary.org

| | |
|--------------------------|------------|
| TO | |
| PREVIOUS BALANCE | .00 |
| TOTAL CLUB BALANCE (USD) | 979.35 |
| PAYMENT DUE UPON RECEIPT | 979.35 USD |

PAYMENTS TO ROTARY INTERNATIONAL ARE NOT DEDUCTIBLE AS
CHARITABLE CONTRIBUTIONS FOR U.S. FEDERAL TAX PURPOSES

The 2016 Council on Legislation voted to increase per capita dues by \$4 per year beginning in July 2017. For more information, please visit
<http://on.rotary.org/COLDues>

Other Duties

- Maintain Club Records
- Ordering supplies i.e. New member badges, packets, pins
- Assisting w/ DG's visit



MEMBER LEADS ON ROTARY.ORG



HOW TO MANAGE MEMBERSHIP LEADS (FOR CLUBS)



ROTARY.ORG > MY ROTARY | Sign in/Register Club Finder Location/Language

Rotary My Rotary Exchange Ideas Take Action Learning & Reference Manage The Rotary Foundation Member News

CLUB & DISTRICT ADMINISTRATION **TOOLS**

- Club Administration
- District Administration
- Contributions
- Reports
- Club Invoice

- Community Marketplace
- RSS Feeds
- Mobile Apps
- Member Data Integration

Go to Rotary.org and sign in to My Rotary. Then go to **Manage**, then **Club Administration**.

1

Rotary My Rotary Exchange Ideas Take Action Learning & Reference Manage The Rotary Foundation

Home | Manage | Club & District Administration | Club Administration

CLUB ADMINISTRATION

PAGE GUIDE

CLUB ADMINISTRATION

CLUB FINANCES

☆ **Club Invoice**

View your club's invoice, pay dues with a credit card, or update invoice preferences

[Club invoice](#) | [Daily club balance report](#) | [Edit invoice preferences](#) | [About the club invoice](#) | [Rotary exchange rates](#)

CLUB & MEMBER DATA

☆ **Manage Membership Leads**

Review your online membership leads for prospective, referred, and relocating members. Then assign and track your candidates through the membership process – from prospect to new member.

View or manage leads | [About the membership leads program](#)

Select **View or manage leads**.

2

If you don't have any leads, you'll get a message that explains why.

MANAGE MEMBERSHIP LEADS

You can filter or sort leads. Scroll down to see more pages.

SHOW LEADS BY:

PROSPECT TYPE: Any STATUS: Any FILTER

| SUBMISSION DATE | PROSPECT TYPE | PROSPECTIVE MEMBER | DISTRICT |
|-----------------|--------------------------------|--------------------|---------------|
| 29-Oct-2015 | Prospective member | John Smith | District 2000 |
| 2-Nov-2015 | Referral | | |
| 2-Nov-2015 | Relocating or returning member | | |

View your leads here. Select a candidate's name to see more information.

3

| SUBMISSION DATE | PROSPECT TYPE | PROSPECTIVE MEMBER | STATUS |
|-----------------|--------------------|--------------------|-------------------------------------|
| 29-Oct-2015 | Prospective member | John Smith | District assigned candidate to club |

PROSPECTIVE MEMBER

FIRST NAME: John

LAST NAME: Smith

EMAIL: Personal johnsmith@hotmail.com

CLUB MEETING LOCATION: ABC city, Antartica

CLUB MEETING DAY: Wednesday

CLUB MEETING TIME: Morning

MEMBER ID

Referral leads show:

- Details about the candidate
- Who made the referral



4

All current officers can manage membership leads. Incoming and immediate past officers can only view them.

MANAGE MEMBERSHIP LEADS

View and manage your membership leads, including prospective, referred, and former or current members who are rejoining or changing clubs. It's an effective way to keep clubs and districts informed about the progress of your candidates.

You are viewing membership leads for the Rotary Club of ABC

Active and historical membership leads report

When you select **Manage status**, you can officially admit the member by selecting **Club admitted candidate**. Select the **ADD** button, complete the additional details, and hit **Submit**.

Some statuses will require you to leave feedback. Other statuses are considered the final step of the process and will move the lead to the historical lead report.

If you admit members using your own database (i.e., ClubRunner), confirm the member ID before adding the member to avoid creating duplicate records.

For members changing clubs, the secretary of their old club must terminate their membership in Rotary's database before they can be admitted into their new club.

Status history shows the progress of active leads and any feedback left by clubs, your district, or staff.

5



My Rotary Exchange Ideas Take Action Learning & Reference Manage The Rotary Foundation

Home | Manage | Club & District Administration | Club Administration | Manage Membership Leads

MANAGE MEMBERSHIP LEADS

View and manage your membership leads, including prospective, referred, and former or current members who are rejoining or changing districts informed about the progress of your candidates.

You are viewing membership leads for the Rotary Club of

Active and historical membership leads report

You can view reports by selecting this link for inactive leads or selecting **View reports** as shown below.

REPORTS

INDIVIDUAL REPORTS

Contributions & Recognition

Donor History Report

View your contributions to The Rotary Foundation

View report | Give online | Mail your report

CLUB REPORTS

Membership Leads

Find a list of active and historical leads in the Membership Leads Report. Review demographics of your leads, and see the average time to admit them in the Membership Leads Executive Summary.

View reports | About the membership leads program

The **View reports** link leads to two reports:

- **Membership Leads Report** — List of active and historical leads and all associated data, by individual lead
- **Membership Leads Executive Summary** — Analysis of how your leads have heard about Rotary, their progress and demographics, and the average time to contact, assign, and admit them

For more information about membership leads, see [Connect to Membership Leads](#). Questions? Email membershipdevelopment@rotary.org.

On my.rotary.org, Click on “Manage”

Go to Manage and then “Club Administration” for Dues Invoice or Member Data.
Go to “Reports” or “Rotary Club Central”



Resources



- **Last Year's Club Secretary**
- **District Secretary**
- **Your Assistant Governor**
- **Committee Chairs** (i.e.: RYLA, Rotary Foundation Polio Plus etc.)
- **Rotary International Web Site**
 - <https://my.rotary.org>
- **Rotary's Learning Center** (courses for officers, chairs, etc)
 - <https://learn.rotary.org/>
- **District Rotary Web Site**
 - www.rotaryd5000.org

Upcoming ClubRunner Training

<https://site.clubrunner.ca/page/webinars>

April 14, 2023 – Changeover Training 2023

April 16, 2023, 6-7pm EDT – Membership and Club Administration

May 17 2023 3:00-4:00pm (EDT) - ClubRunner Essentials Training -Learn the basics and fundamentals of ClubRunner for your club including: How to login, How to send an email to your members, How to view club reports

April 19, 2023, 4-5pm EDT - Membership Management

April 19, 2023, 7-8:30pm EDT - Membership Management & Rotary International Integration Learn how this exciting database integration feature will automate member updates between your ClubRunner database and RI's MyRotary. Plus, an overview on how to Edit and maintain the member directory, Report membership changes to districts and Rotary International, Edit executives and directors, Set up tasks for new member orientations

April 21, 2023, 6-7pm EDT - Website Live Designer Get a hands-on demonstration of how to configure and customize your site

Mahalo!