

Pre-PELS February 2025 Club Runner: Managing Club Executives My Rotary: Rotary Club Central and The Learning Center

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OBJECTIVES

- What is MyRotary
- Create a MyRotary Account
- Rotary Club Central: Goals
- What is Club Runner?
- How to Access Club Runner
- Managing Club Executives in Club Runner

WHAT IS MY ROTARY?

Member Portal/Dashboard www.Rotary.org

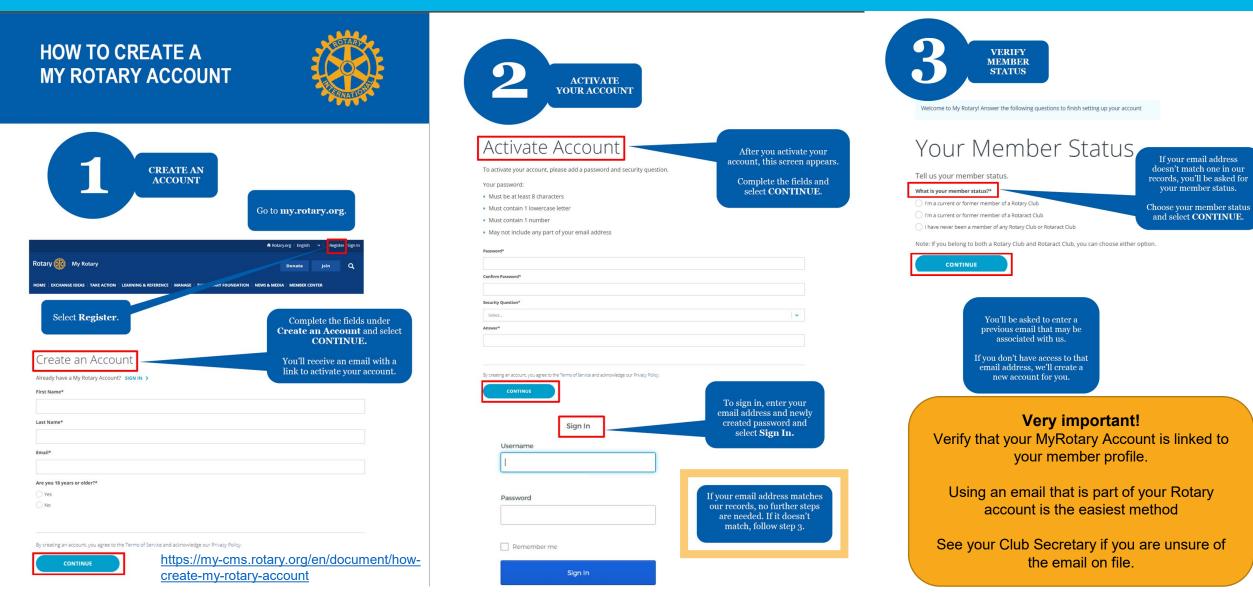
- My Rotary is a tool maintained by Rotary International
- There is information for the general public about Rotary as well as member-only areas.
- All clubs across the globe have access to this resource
- It serves as a membership portal and reporting tool.
- All of Rotary International's member resources can be found on MyRotary.
- "The Mothership"

MY ROTARY

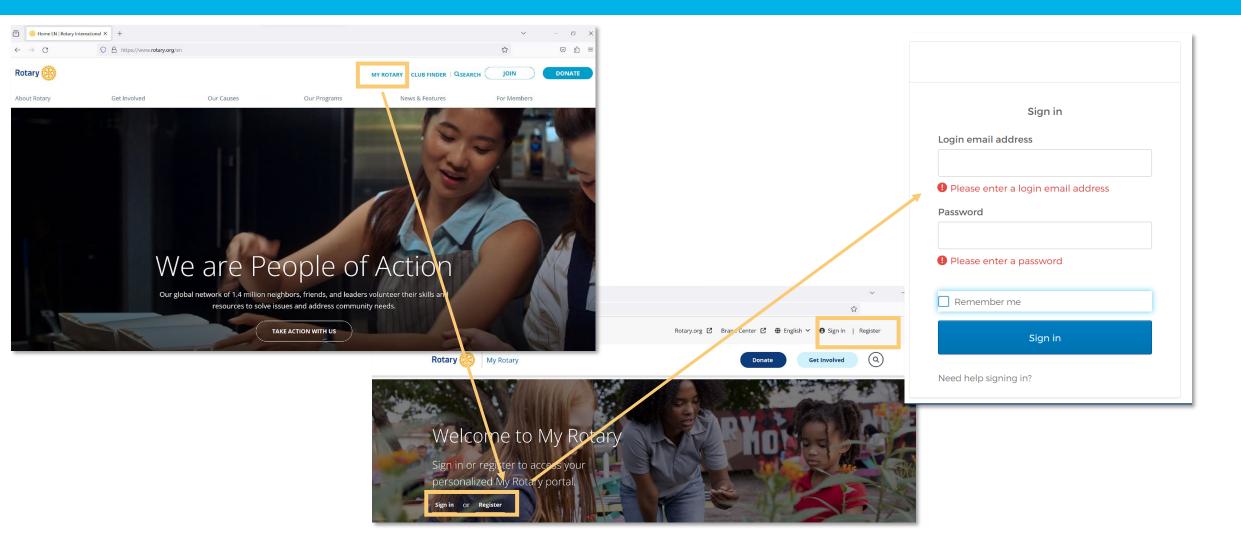
Member Portal/Dashboard www.Rotary.org

- View your member profile [all updates should be made in your District database]
- Access Rotary Club Central
- Enter your club goals
- Club membership roster reports
- View your club invoice [based on leadership role]
- View the Rotary Service Project Center
- Make/View contributions to The Rotary Foundation
- Download logo and templates in the Brand Center
- Access The Learning Center

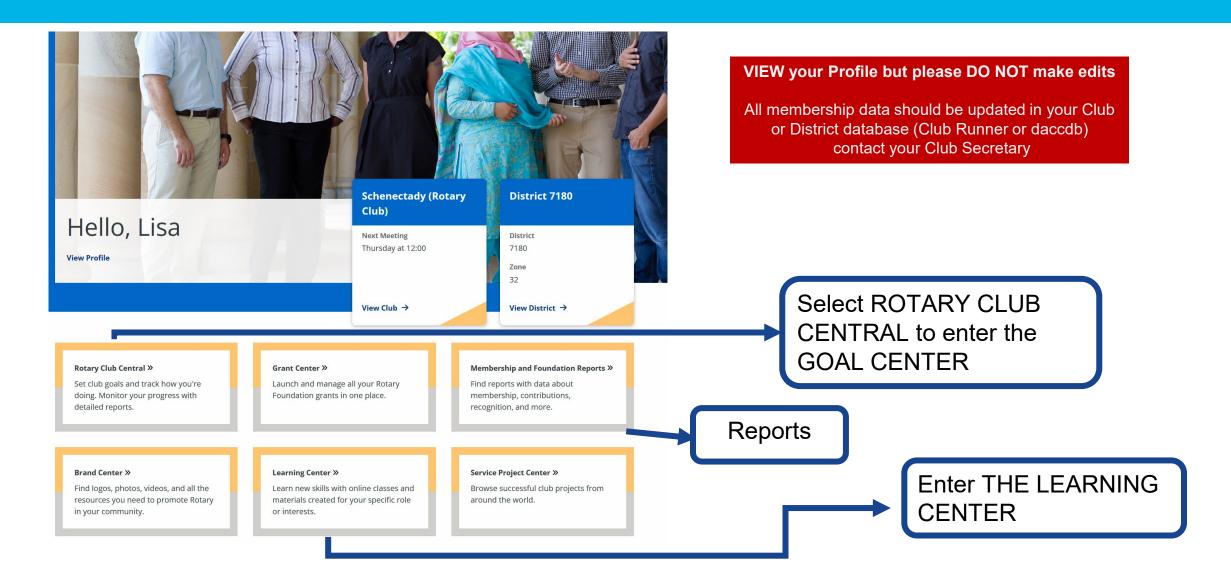
CREATE A MY ROTARY ACCOUNT



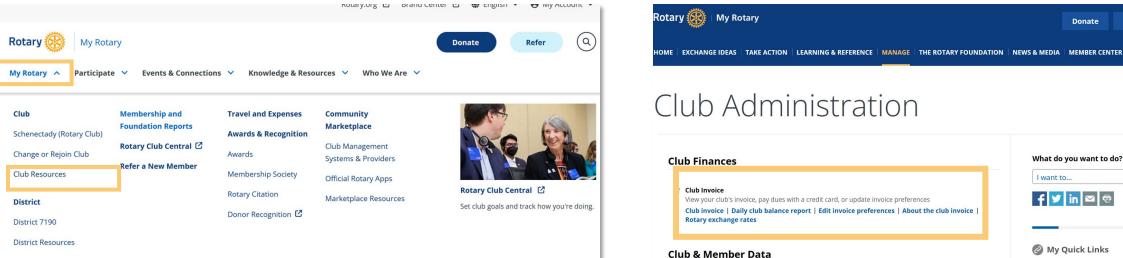
LOGIN TO MY ROTARY



MY ROTARY YOUR MEMBER DASHBOARD



CLUB ADMINISTRATION



Forms & Instructions

ත් Name Change Notify Rotary about a proposed change to your club's name or locality. Change of Rotary Club Name and/or Locality

් Merger Step-by-step instructions on how to merge two clubs. Club merger forms and instructions

岔 Member Confirmation Confirm membership and financial standing for former club members. **Confirmation form**

☆ Insurance and IRS (U.S. only)

Access resources about the U.S. Rotary club and district liability insurance program and tax forms. U.S. Rotary club and district liability insurance program | IRS forms and instructions

View Club Invoices Membership Rosters Club Sponsorship: Rotaract, Interact, Satellite **Membership Leads**

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

🔺 Update Member Data

Report membership changes within 30 days, no later than 1 January or 1 July, to ensure your club invoice reflects the latest information. Record new member sponsors.

Add, edit, or remove members | Add, edit, remove club officers | Record a new member sponsor

🗘 Update Club Data

Provide club contact information and choose club management providers. Update meeting details | Update mailing address and contact information | Designate a club management vendor

🏠 Manage Membership Leads

Review your online membership leads for prospective, referred, and relocating or returning members. Then assign and track your candidates through the membership process - from inquiry to induction

View or manage leads | About the membership leads program

Club Sponsorships

Rotaract







Donate

Join

My Quick Links Click 🛱 to add links and 🚖 to remove links.

* Rotary Club Members View list

Don't forget: all Member and Club adds, edits, and deletes should be completed in your Club or District database. not in MyRotary

pay your invoice, update club officers, and more.

Frequently Asked Questions Club & District Administration Club Invoice Paul Harris Society (PDF) **RI Payment Guidelines (PDF)** Rotary.org Rotary Grants Travel Insurance (PDF)



ROTARY CLUB CENTRAL

Reporting Tool within MyRotary

- View Membership Dashboard with demographics
- Benchmark your goals against clubs from around the world
- Enter and Review Club Goals
- Membership, Foundation Giving, and Service Metric reports

y 🥘 Club Central	
b Goals bal Summary 🗸	Club Goals Choose and set the goals your club will focus on and track progress. Learn how to set and track your club's goals
nds 🗸 🗸	Rotary Club of < 2024-25 > ¹ 2 goals achieved of 16 selected
oorts ntact Us	All Goals Enhance Participant Engagement Increase our Impact Expand Our Reach Increase C
	 Priority Goals Club membership riority Show goal details and history
	 Show goal details and history
	Service participation relation Priority Show goal details and history

Rotary

🎯 Club

🌐 Glob

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🛄 Resc

👌 Repo

🔄 Cont

View: All members

Edit: Presidents Presidents-Elect (for their respective year's goals) Secretary Executive Secretary

ClubRunner access-levels do not translate to MyRotary access-levels.

ROTARY CLUB CENTRAL

Who has access?

CLUB GOALS

Why should you select goals for your club?

Goals are a TOOL to assist in planning and accountability

16 goals available

- 1. The process of identifying and setting goals is a **TOOL** to help your club thrive.
- 2. Work with your club leadership and the membership at large to determine where the club wants to focus its resources (both financial and volunteer time).
- 3. Setting goals provides a target to work toward.
- 4. Regular status updates allows the club to focus on areas of weakness and celebrate successes.
- 5. Measurable goals provide a narrative to share with your members and the community.
- 6. District leadership can view this data for their planning needs.

CLUB GOALS

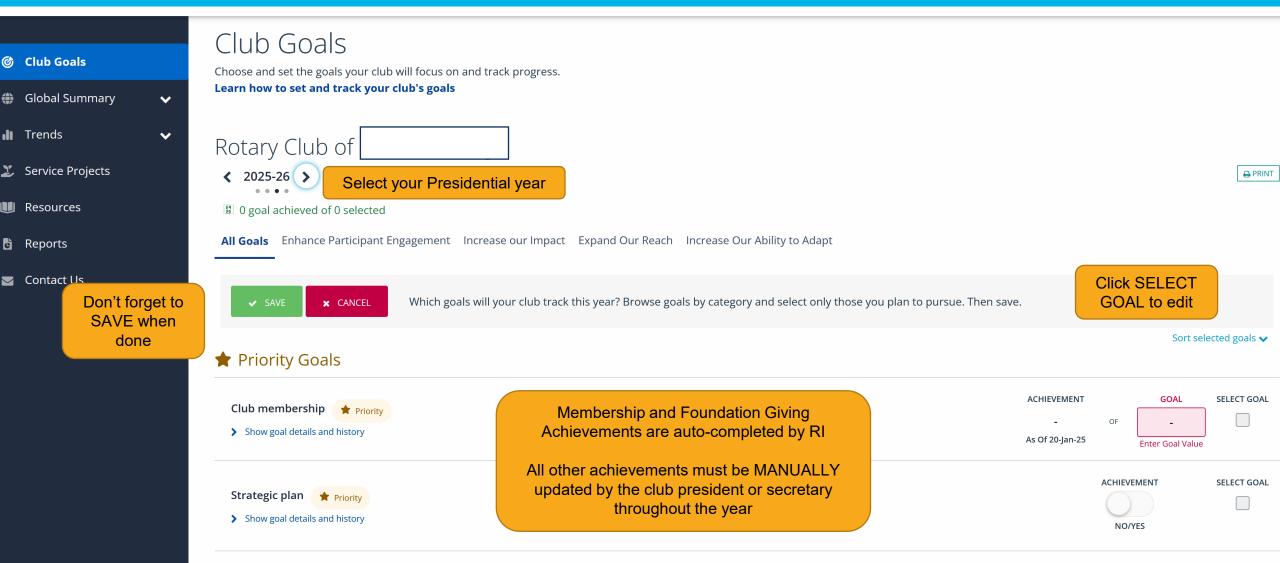
Think of the Rotary ACTION PLAN

IMPACT – REACH – ENGAGE – ADAPT

- REACH How many volunteer hours were utilized?
- IMPACT How much money was raised?
- IMPACT Where were grants distributed?
- REACH How many community members were served by Rotary volunteerism, grants, other?
- ADAPT In which areas does the club need more support?
- ADAPT Where does the club excel?
- ENGAGE What was the membership gain/loss?

ENGAGE – How many members participated/supported Club or District programming?

CLUB GOALS



CLUB EXCELLENCE AWARD

Club Excellence Award

Wha

The Club Excellence awards, formerly the Rotary Citation awards recognize the hard work clubs do throughout the year. Working to achieve the Club Excellence goals helps clubs engage their members, increase their impact, stay relevant in their communities, and run more efficiently. A welcoming and engaging club not only fosters a positive experience for its members, but also reflects the values of Rotary. When clubs achieve these goals, they contribute to the overall health and culture of Rotary for generations to come.

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Your Rotary, Rotaract, or Interact club can earn a Club Excellence Award for achieving goals that strengthen Rotary and your club. Goals include increasing club membership, engaging members in sustainable service projects, giving to The Rotary Foundation, building awareness of Rotary in your community, and having an up-todate strategic plan.

Rotary Club Excellence Award

Club excellence goals can be found in Rotary Club Central. To achieve the Club Excellence Award, review all the available goals, select at least half of them, achieve those goals, and report your achievement in Rotary Club Central.

All achievements need to be reported in Rotary Club Central by 30 June.

Rotaract Club Excellence Award

Rotaract clubs can find their goals in Rotary Club Central beginning 1 July 2024. Clubs that set, achieve, and report goal achievement of at least half of the goals by the end of the Rotary year will earn a Club Excellence award.

Only Rotaract clubs that have an active charter with Rotary International are eligible for the citation. To confirm that a club is active, Rotarians can check the Listing of Club-Sponsored Organizations in Rotary Club Central.

All achievements need to be reported in Rotary Club Central by 30 June.

Interact Club Excellence Award

Interact clubs that achieve the Interact goals by the end of the Rotary year will earn a Club Excellence award.

Only Interact clubs that have an active charter with Rotary International are eligible for the award. To confirm that a club is active, Rotarians can check the Listing of Club-Sponsored Organizations in Rotary Club Central.

All achievements need to be reported by 15 August.

There are 16 goals to achieve.

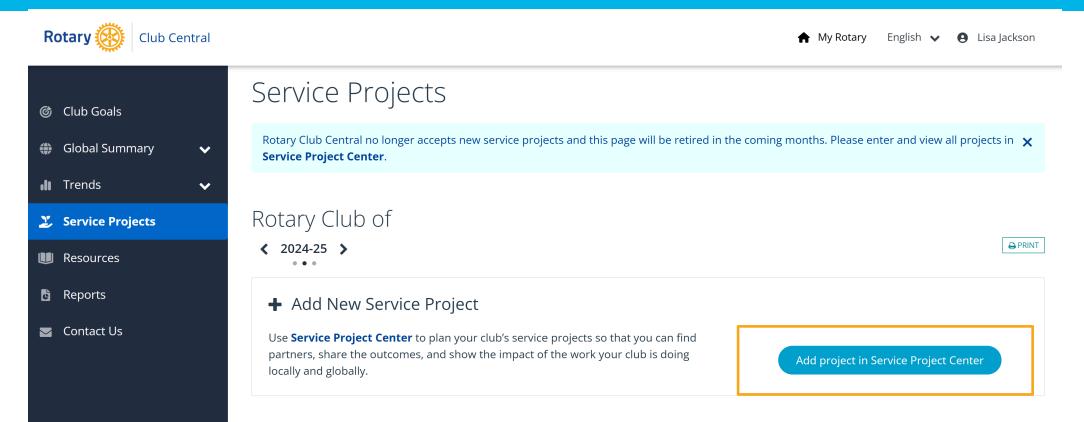
Lead your club in selecting at least half (8) of the goals and setting targets.

Enter your progress into the Goal Center throughout the year.

Achieve at least half (8) of the available goals to earn a Club Excellence Award.

https://my.rotary.org/en/news-media/office-president/club-excellence-award

SERVICE PROJECTS



Use the Service Project Center during project planning to promote the project, partner with other Rotary Clubs, and get new ideas! Rotary International uses this information to measure the impact of Rotarians make across the world!

SERVICE PROJECTS

3 New!	
Welcome to the Service Project Center! Learn more	
	Welcome My Rotary 🖸 🌐 English 🗸
Rotary 🛞 Service Project Center	Add a New Project
Home Rotary Campaigns Browse Projects My Club Projects	

Adding a NEW Project – [be prepared with the following elements]

- Project Title
- Overview
- Detailed Description
- Project Category
- Project Location (for map display)
- Timeline (start date, complete date)
- Funding Sources
- Community needs, project impact, and sustainability
- Project Partners
- Pictures/Video
- Project Difficulty
- Engagement: Volunteer hours, number of volunteers, contributions (cash and in-kind)

Keyword	
Enter a keyword	
Project Status	
Proposed, seeks global grants partners	
Proposed, seeks other partners	
In Progress	
Completed	
Country	
Select	```
Club	
Enter a club name	
District	
Select	、 、

RESOURCES

Rotary 🛞 Club Central								
🎯 Club Goals								
🌐 Global Summary 🛛 🗸	Summary V General Resources							
📶 Trends 🗸 🗸	RESOURCE	DESCRIPTION						
🇶 Service Projects	How to Set a Goal in Rotary Club Central	A step-by-step visual guide to selecting and setting a goal						
进 Resources	How to Report Progress on Goals in Rotary Club Central	A step-by-step visual guide to updating goals with progres						
🔁 Reports	How to View Information in Rotary Club Central	A step-by-step visual guide to using features within the Ro						
Contact Us	Membership Resources							
	RESOURCE	DESCRIPTION						
	Rotary Club Health Check (PDF)	Evaluate the health of your club and identify strengths an						
	Membership Assessment Tools (PDF)	Understand the similarities between your club and comm						
	Strengthening Your Membership: Creating Your Membership Development Plan (PDF)	Develop a plan to recruit, engage, and retain members.						
	Connect to Membership Leads (PDF)	Manage membership leads for your club or district.						
	Club Flexibility	Understand how the most recent Council on Legislation fl						
	Young Leaders Resources							
	DESCRIPTION							
	Youth Exchange	Learn more about Youth Exchange and how to get your cl						

Don't skip over the Resources tab

Links to documents, "how-to" guides, and tools to help you effectively lead your club

Share these tools with your club leadership and committee chairs

CLUB RUNNER

Membership Database



District Membership Database

- Add, Edit, and Delete club members
- Assign Club Executives
- **Sync** members and club executives with Rotary International *(resolve sync errors)*
- Members can login and **update** their own information
- Creating membership directories*
- Creating newsletters*
- Club websites*
- Bulk email communications*
- Event management*
- Calendars*

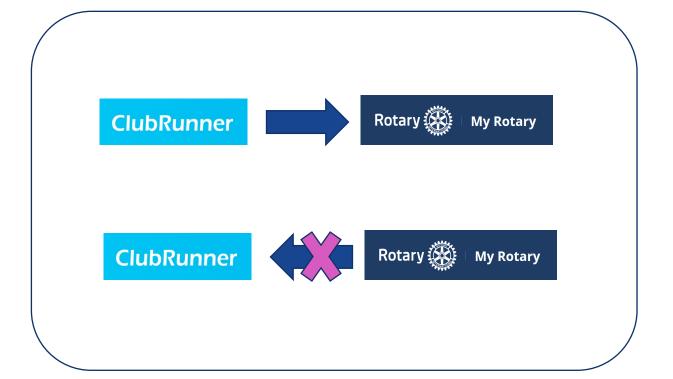
Note: there is a free <u>Club Runner app</u> available for Android and iPhone. Electronic district directory.

*Some services only available with additional club-level subscription.

CLUB RUNNER



WHERE SHOULD I ENTER DATA?



There are many third-party membership database tools available to Rotary clubs. Club Runner is one of those tools.

Membership Data should ALWAYS originate in Club Runner as it is designed to import into MyRotary

WHERE DO I FIND CLUB RUNNER?

DISTRICT WEBSITE: www.CNYRotary.org or www.Rotary7120.org

OR YOUR CLUB WEBSITE IF IT IS POWERED BY CLUB RUNNER]

Club Runner is the name of the club management software. Access it by using the Member Login on the top of the District Website.

Search Q Member Login	ClubRunner
Rotary W Home Get Involved News Network Events - Club Resources - More Resources - Contact Us CNY Rotary OUP CONT CNY	Home Enter your login information below: Username Forgot username?
Stop beal your way whether you own your business or not!	Password Forgot password?
Usernames are assigned by the club secretary. They can reset passwords as well. You can also select FORGOT PASSWORD and it will be emailed to the email on your account.	

If you have changed emails since you became a member, please verify your information with your club secretary.

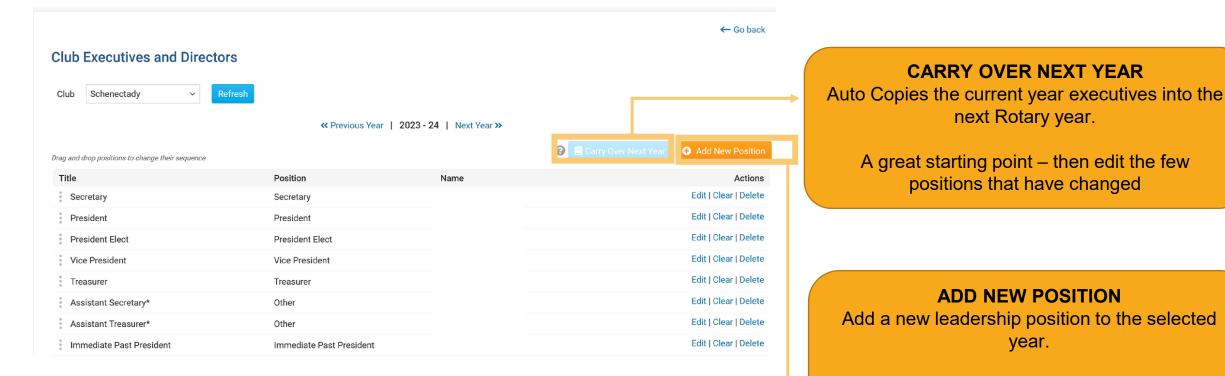
CLUB RUNNER DASHBOARD

START HERE for Membership Maintenance							
$\leftarrow \ \ \rightarrow \ \ G$	O A ≈ https://admin.clubrunner.ca/50091/Welcome	☆	ල දු ≡				
🛞 District 7190		Welcome,	Logout] Home English -				
Admin For Clubs For Members	Membership Contacts Organization Communication Website Documents Reports Attendance Events Bulletin Donations Help						
Launchpad Admin (New) Admir	nistration Edit Privacy Policy ClubRunner Mobile Help Guides Webinars Contact Support						
	District Administration						
	District Administration Members		4				
	Rotary Welcome back, Line! This is your newly redesigned Administrator dashboard.						

MANAGING CLUB EXECUTIVES

Oistrict 7190AdminFor ClubsFor MembersMembership ListsDefine Club Execution	Membership Contacts Organization Communica utives ਦਰਜ਼ Club Information RI Integration (New) N	Email distribution is often based on member roles. For instance, your club treasurer receives invoices from RI, the Foundation Chair receives notifications regarding giving, and your President-Elect will receive information regarding training schedules.			
RI Member Synchronization					← Go back
	District Administration	Club Executives and Directors	Previous Year 20	23 - 24 Next Year »	
	District Administration Members	Drag and drop positions to change their sequence			Carry Over Next Year Odd New Position
		Title	Position	Name	Actions
		Secretary	Secretary		Edit Clear Delete
		President	President President Elect		Edit Clear Delete Edit Clear Delete
		Vice President	Vice President		Edit Clear Delete
		Treasurer	Treasurer		Edit Clear Delete
Select appropriate Rotary year to edit		Assistant Secretary*	Other		Edit Clear Delete
		Assistant Treasurer*	Other		Edit Clear Delete
		Immediate Past President	Immediate Past President		Edit Clear Delete

MANAGING CLUB EXECUTIVES



In addition to required Rotary board positions, you can add all leadership positions for your club's board of directors and committee chairs.

MANAGING CLUB EXECUTIVES

			← Go back	
Club Executives and Directors				
Club Schenectady ~ Refrest				
	Previous Year 2	2023 - 24 Next Year »		
rag and drop positions to change their sequence			Carry Over Next Year Add New Position	Add New Position
Title	Position	Name	Actions	
Secretary	Secretary		Edit Clear Delete	Position:*
President	President		Edit Clear Delete	
President Elect	President Elect		Edit Clear Delete	Title:*
Vice President	Vice President		Edit Clear Delete	Name:
Treasurer	Treasurer		Edit Clear Delete	Name.
Assistant Secretary*	Other		Edit Clear Delete	
Assistant Treasurer*	Other		Edit Clear Delete	
			Edit Clear Delete	

Edit:change members assignedClear:keep the position, remove the memberDelete:remove the member and the position

Technology Resources: Which one do I use when...

	Rotary International	My Rotary	Rotary Club Central	District ClubRunner	Club Level ClubRunner	
Users	All	All	Current President, PE, and Club Secretary	All	Primarily President and Secretary, but all Rotarians have access to their club's CR	
					*not every club has a Clubrunner subscription	
Account needed	No, unless you need to use the Member Center (please note: the Member Center takes you to My Rotary)	Yes - this will require login and password different from Clubrunner	Access from My Rotary	Yes - your login is the same for both		
When to use	*General info about Rotary How established Getting involved Causes Programs News and Features *Link to My Rotary	*Access/edit your profile *Access your donations *Learning center *Info related to: Rotary Foundation Club management RI news and media Brand center Grants	*online tool for setting goals and tracking progress, exploring data and trends, and more	*Most club-level work will be done through ClubRunner *Email services *Adding/removing members *District documents		
Reports available	None	*Individual reports *Club reports *District reports *Regional reports *Grant reports	Club, District, and Regional Reports related to: *Members and engagement *Rotary Foundation Giving *Service		*Club documents *Email services for club membership	
Other			*Age distribution *Gender distribution *Years of Service *Login activity *Rule of 85 *Birthdays & Anniversary *Member data *Member profiles *Club profile			

Thank you! QUESTIONS?

RESOURCES

Information Resources from Rotary International

- data@rotary.org
- <u>https://my.rotary.org/en/learning-reference/learn-topic/rotaryorg-frequently-asked-questions</u>

For Zone 32:

- Club and District Support (CDS) contact at Rotary International Mallory Ori Mallory.Ori@rotary.org
- Rotary International Officers, Club and District Support, Americas
- Zone 28 and 32 Website: <u>https://portal.clubrunner.ca/50077/</u>