

2025 Rotary Multi District Training Institute

August 2, 2025, 9:30-11:30 a.m.

Treasurers/Secretaries/Finance Teams

Agenda

9:30 a.m.	Introduction and Session Overview	Dian Edwards, D5870
9:35 a.m.	Role of District & Club Treasurers	Dana Sisk, D5930
	Role of District & Club Secretaries	Jan King, D5840
10:45 a.m.	RI Learning Center and RI Resources	Amy Hopkins, RI Staff
11:05 a.m.	District Finance Committees	Dana Sisk, D5930
11:15 a.m.	Questions/Answers/Final Thoughts	Jan King, D5840 Dana Sisk, D5930
11:25 a.m.	Evaluations and Adjournment	Dian Edwards, D5870

Facilitators

Jan King, District 5840



**Dana Sisk
District 5930**

Collaborative Role of District and Club Treasurers and Secretaries



Class registration numbers: 1/3 District Officers, 2/3 Club Officers

District Treasurer Role

Here's what we know:

- It can be one of the most time-consuming district roles
- There are several VERY important deadlines to know
- Continuity across Rotary years is critical
- Things change quickly! (my disclaimer)



District Treasurer Common Duties



Supporting the District governor in creating a budget and periodic reporting to the District



Collecting district dues from clubs



Making payments for district operations and event expenses



Collecting event fees/registrations



Filing required reports with RI and tax returns



“All other duties as assigned” ... negotiations...

Tips for New District Treasurer

1. Visit with current/past District Treasurers as soon as you accept the job!

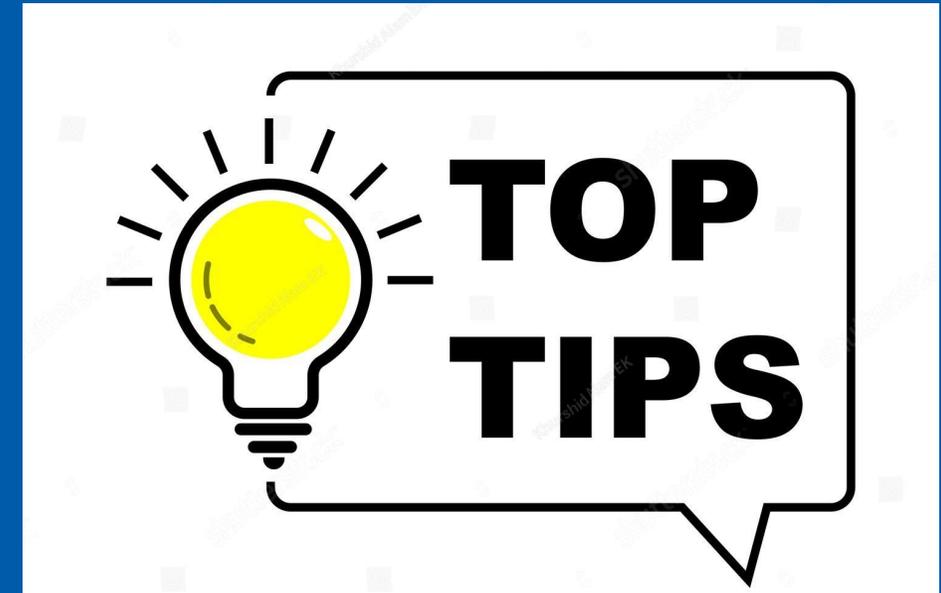
- Is there a job description for this role in your district?
- Do the district bylaws/guidelines define your responsibilities?
- Get to know the district budget – most things recur from year to year
- Get to know the tools used for financial management (Quickbooks, ClubRunner, others). Get login credentials and training as soon as possible.

2. Create a calendar of important dates and deadlines

- I can provide an example – dsisk@rallycu.com
- July 1 is TOO LATE!

3. Find other training

- Learning Center “District Finance Committee Essentials”
- RMDTI and Zone training



Club Treasurer Role

Similar to District Treasurer:

- It can be one of the most time-consuming club roles
- There are several VERY important deadlines to know
- Continuity across Rotary years is critical
- Things change quickly! (same disclaimer)



Club Treasurer Common Duties



Manage club funds



Report on the state of club finances



Collect club dues



Pay RI and District Dues



Collect event fees/registrations

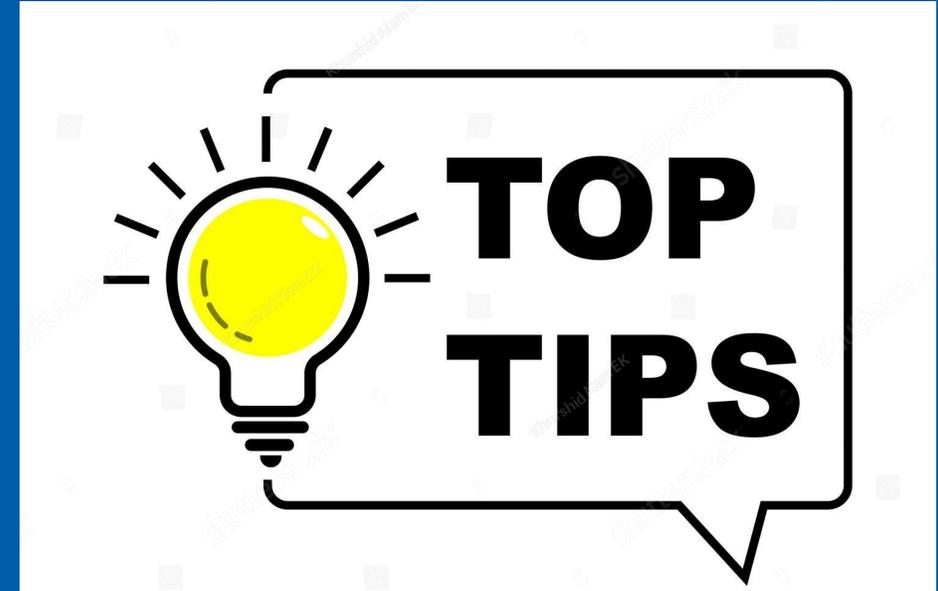


File required reports with RI and tax returns

Tips for Club Treasurers

See Treasurer Handout for:

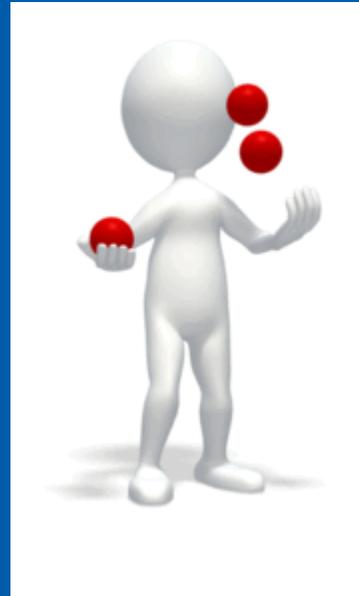
- What You Do
- How to Prepare
- Resources and Reference Tools



District Secretary Role

Here's what we know:

- The job is different every time
- There is no official job description
- There is no formal training
- Things change quickly! (my disclaimer)



District Secretary Common Duties



Supporting the District governor in organizing meetings, District events, and club visitation schedules



Taking minutes, recording actions at District meetings



Supporting clubs with reporting and related obligations to Rotary International



“All other duties as assigned”!

Tips for New District Secretary

1. Visit with the past District Secretary about their duties.

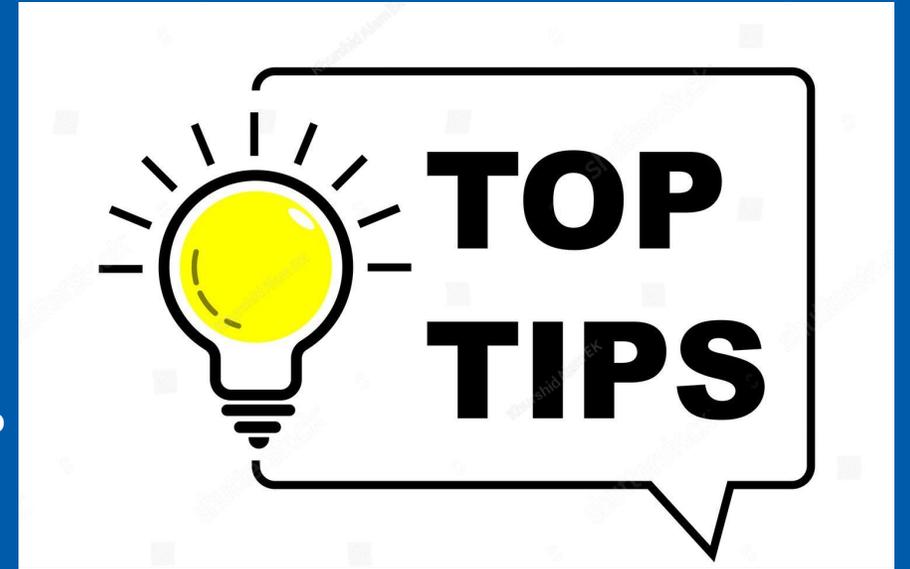
- Is there a job description for this role in your district?
- Do the district bylaws/guidelines define your responsibilities?

2. Visit with your DG to discuss their expectations.

- Review suggested job duties, discuss which are most valuable to this DG.
- DG needs vary widely!

3. Find out what tools are used by your district (Clubrunner, Zoom, others?)

- Get login credentials and training as soon as possible. You may have to self-teach or find SME's in the district to help you.

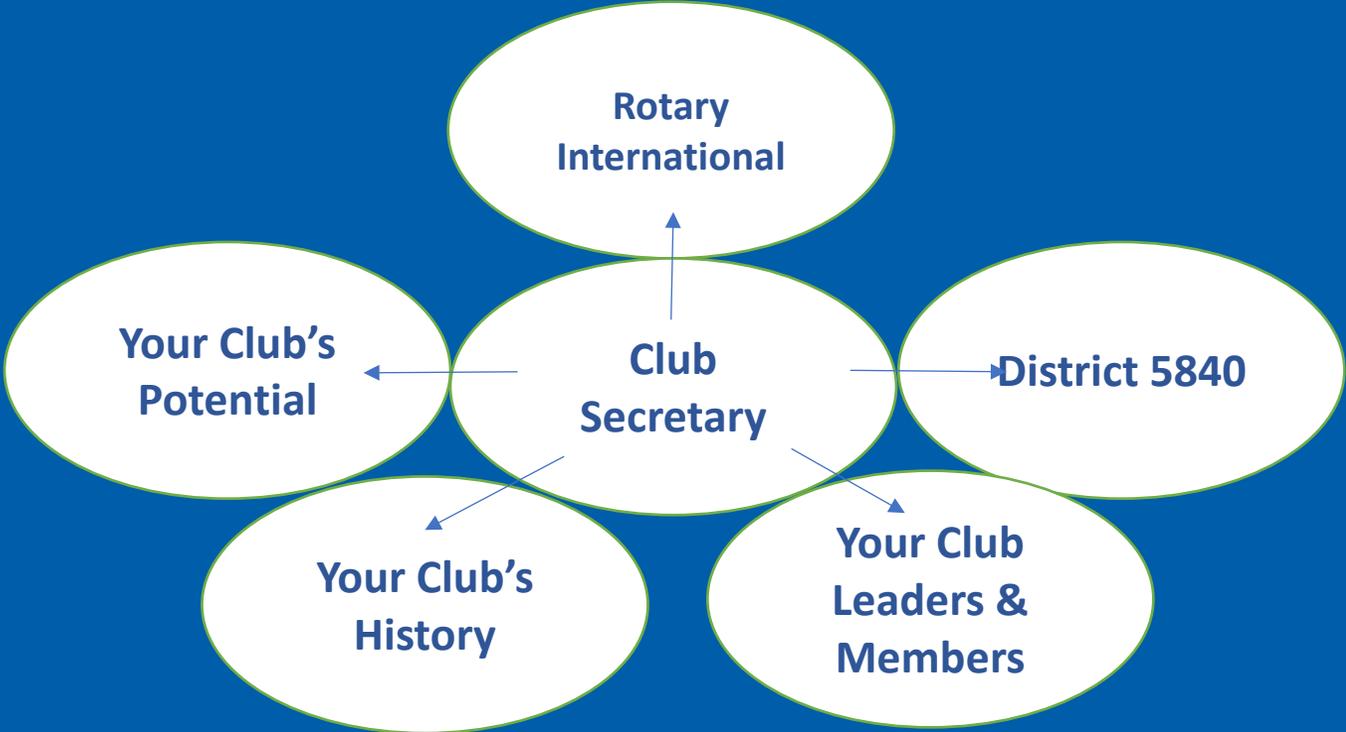


District Secretary Level Up Ideas

1. Volunteer to attend and take minutes for district committee meetings, distribute action items
2. Volunteer to facilitate district communications for DG, district committees, etc.
3. Create or update job descriptions for district leadership roles
4. Create or improve archive of district records
5. Partner with the District Treasurer to encourage timely club payments of district and RI dues
6. Partner with club officers to set goals and designate club officers in ClubRunner / Club Central
7. Create and distribute district calendars with key date reminders to clubs
8. Create and distribute administrative checklists for clubs at beginning/end of year



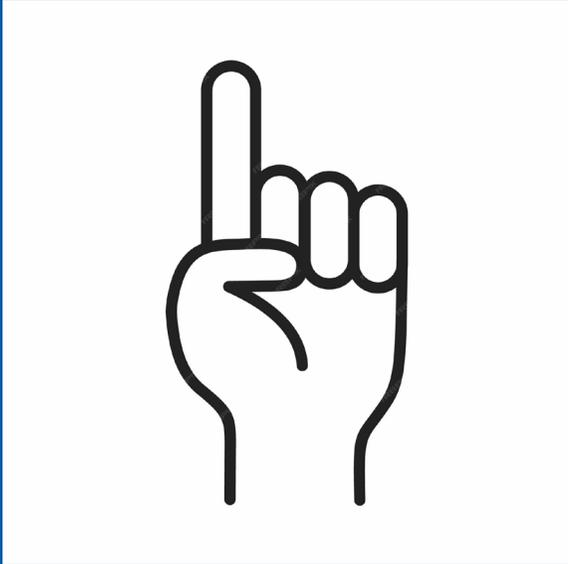
As Club Secretary, you are the “golden link” between:



What you do... and Why

- Accurately maintain your Club's membership records
- Keep Club meeting location, date and time updated at RI and District
- Keep Club leader and member information updated at RI and District
- Ensure RI has an accurate (current) Club address for your Club's correspondence
- Assist in developing and recording your Club goals in Rotary Club Central
- Maintain minutes/notes of club, board and committee meetings
- Track your Club's service projects, and share on RI's Rotary Service Project Center <https://spc.rotary.org>
- Because RI invoices your Club based on the number in THEIR database
- Because potential and visiting Rotarians need to know how to find you
- Because Rotary leaders need to know who to contact when necessary
- Because RI still uses the postal system to send important correspondence
- Because this is how your Club can track its impact on your community
- Because this is the history of your Club's activities in service to your community
- Because this is how RI tracks our international contributions to humanity, AND it may inspire other clubs

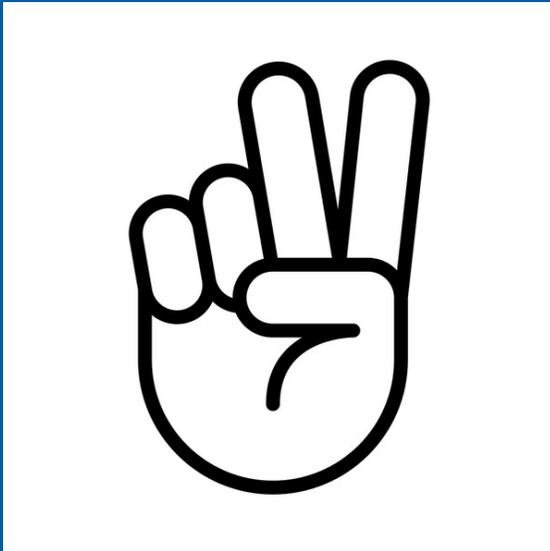
First Things First...



- Make sure YOU have a My Rotary account set up!
- Make sure your Club is plugged into Club Runner
If your Club does not subscribe to Club Runner, you can get access to Club Runner through the District (this is VERY important)
We have detailed instructions for setting up and synchronizing Club Runner for RI integration

Second thing ...

My Rotary vs Rotary Club Central vs Club Runner



- My Rotary is the platform used by Rotary for ALL member information (i.e., Foundation donations, etc.)
- Rotary Club Central is the platform used by Rotary International for all club-related information (i.e., goals, completed goals, membership data, etc.)
- Club Runner is a platform most clubs use to input all of their Club information (i.e., officers, goals, members, etc)
 - AND, it allows Clubs to store documents like board minutes, treasurer reports, etc.

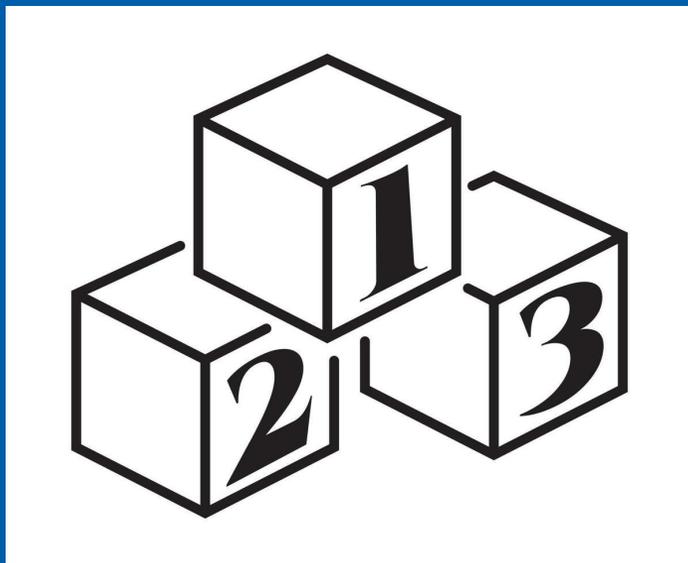
HOWEVER...

- In order for Club Runner to talk to My Rotary, INTEGRATION must be turned on!

BOTTOM LINE:

- What is input into My Rotary goes down to Club Runner, BUT, what is put into Club Runner must have INTEGRATION turned on in order for Rotary International to recognize it!

Basic Tools



- Pay or view your Club invoice
- Set and track Club goals
- Update Club membership
- Update Club meeting information
- Update Club leadership information
- Update Club membership information

My Rotary

Rotary Club
Central

Club Runner

Club Runner

Club Runner

Club Runner

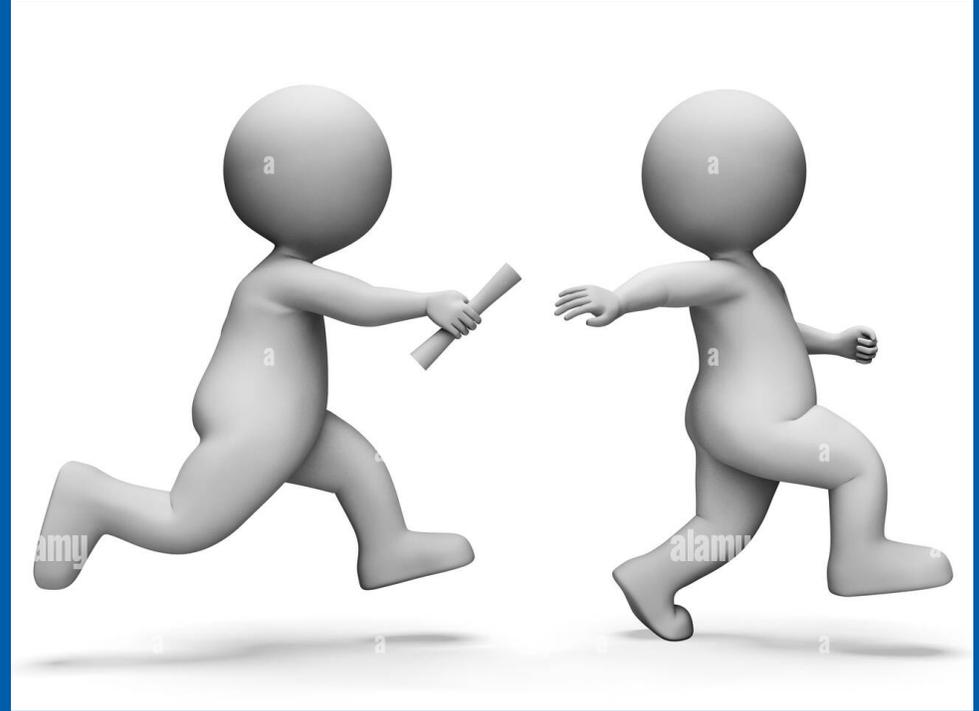
Best resources are in the Club Administration FAQ and Help page in My Rotary!

Helpful Hints

- Work with your outgoing secretary to understand how the Club functions
- Know which Club management system your Club uses, and understand how it interfaces with the District and Rotary International
- Review your Club's bylaws, and keep them handy
- Know where your Club's documentation is kept/archived
- Work with your Board of Directors to:
 - Plan your year and review your strategic plan
 - Determine who is responsible for various Club functions, such as:
 - Internal and external communications
 - Managing membership leads
 - Maintenance of Club supplies
- Set up a simple format for meeting agendas, minutes, and routine Club activities



Welcome:
Amy Hopkins



District Finance Committee Role

- Committee composition usually defined by the District
- Committee responsibilities versus Treasurer responsibilities may vary by District
- Continuity across Rotary years is critical
- Committee can bring great value by maintaining a financial calendar of deadlines, procedures, and records archival



Open Mic Q/A



Wrap Up

Evaluations

Thank you!

