

CLUB SECRETARY PREPARATION CHECKLIST



ACTIVITY - By the First Week in June	OUTGOING	INCOMING
Have a working login for DaCdb and for My Rotary - (a User Name & Password that works)		<input type="checkbox"/>
Have visited and explored the District website - www.rotarynj.org		<input type="checkbox"/>
Have used <u>My Rotary login</u> to visit and explore the various sections under "Club Administration"		<input type="checkbox"/>
Have used DaCdb login to visit and explore the various Tabs of information		<input type="checkbox"/>
Have reviewed on-line resources for Secretary position - www.rotarynj.org/forms-and-resources.php		<input type="checkbox"/>
Have verified that incoming President, Secretary, Treasurer, Membership and Foundation chairs are in DaCdb (change automatically on July 1)	<input type="checkbox"/>	
Have verified that incoming club officers (above) are identified in My Rotary via DaCdb (will also change on July 1)	<input type="checkbox"/>	
Retrieved and saved most recent Club Recognition Summary (CRS) & Monthly Contribution Report (MCR) reports from My Rotary and emailed to Club President and Foundation Chair	<input type="checkbox"/>	
All membership information is up do date and accurate so the RI Invoice will be accurate and calculated on the correct membership number	<input type="checkbox"/>	
Have successfully updated my own member profile in DaCdb, the District and Club Database		<input type="checkbox"/>
Reviewed/know how to add a member to DaCdb		<input type="checkbox"/>
Reviewed/know how to edit my own and my club members' profiles in DaCdb		<input type="checkbox"/>
Reviewed/know how to enter monthly meeting attendance in DaCdb		<input type="checkbox"/>
Reviewed/know how to send Pmails to club member(s) in DaCdb		<input type="checkbox"/>
Reviewed/know how to find District officers, committees, and information on the District website - www.rotarynj.org		<input type="checkbox"/>
Copied any club-related electronic files (documents, etc.) to a CD or flash drive and passed on to incoming Secretary	<input type="checkbox"/>	
Have a computer with a high speed connection at home/office for club work – loaded all club-related electronic documents from outgoing Sec'y		<input type="checkbox"/>
Reviewed the manual <i>How to Lead Your Club - Secretary</i> either from club President-elect or via downloaded from www.rotarynj.org		<input type="checkbox"/>
ACTIVITY - July		
Record attendance weekly and calculate monthly attendance % for club		<input type="checkbox"/>
Have reported the club's JUNE attendance in DaCdb after allowing two weeks for any makeups		<input type="checkbox"/>
Forwarded RI Invoice for dues to Club Treasurer for payment		<input type="checkbox"/>
Forwarded District Invoice for dues to Club Treasurer for payment		<input type="checkbox"/>