



Year End Check List - 2024

Lin Kelly - 2024-06-11 - District Support

Checklist for Rotary Clubs & Districts - End a Year/Start a Year

Club Checklist:

— **RI Club Member Compare & Membership:** Be sure to remove any members that are no longer in the club or plan to stop membership on June 30th. Also, be sure to add any new members by June 30th so your July 1st Rotary invoice will be correct. **Please be aware that your club will be billed by Rotary for the Active members listed on July 1st in Rotary. Also, be sure to update members' information if there have been changes.** *Here's a short training video on RI Member Compare:* [DACdb - End a Year Start A Year Part I - RI Integration](#)

— **RI Club Officer Compare:** Be sure to check your club's Officer Compare before June 30th to make sure that all of your club officers are reported to Rotary. In addition, we recommend checking your Officer Compare on December 31st so any changes made between July 1st and December 31st are reported correctly in Rotary. *Here's a short training video on RI Member Compare:* [DACdb - End a Year Start A Year Part I - RI Integration](#)

— **RI Club Info Compare:** Be sure to check your RI Club Info before June 30th each year to make sure that any changes in club contact information, meeting location, meeting time has been reported correctly to Rotary. *Here's a short training video on RI Member Compare:* [DACdb - End a Year Start A Year Part I - RI Integration](#)

— **Adding Club Positions:** Be sure to assign your club positions for the next Rotary year. If not assigned, the previous year's officers may be

assigned to the same positions and new officers may not have the necessary user level to access features available to higher level users in DACdb. *Here's a short training video on Adding/Editing Club Positions:* [DACdb - End a Year Start A Year Part II - Adding Club Positions](#)

— **Review Member Security Levels:** After July 1st, be sure to review the security levels of your club members and make sure the appropriate level is set for the members. While preferable to control security levels by editing club positions with start and end dates (see above), some security levels are manually set for members under the Login tab in the member record and will remain the same level until it is manually updated to a lower level. On the member list page, Club Officers with level 4 access can click on the Cogwheel in the top right corner to add the Security Level column to be viewed on the member list page. [Click here](#) for the list of Security Levels or visit the Support/Learning tab, click the submit ticket button and in the search bar type “DACdb Security Levels”.

— **Club Member Information Verify:** Use Club Verify and send a PMail to all club members using PMail System Templates 15b or 15w to your club members which will allow them to review all the information listed in their DACdb profile and either Verify the information is correct by clicking on the Verify button at the bottom or click on Edit Member Record button to login and update their DACdb record. *Here's a short training video on Club Verify:* [DACdb - End a Year Start A Year Part V - Club Verify](#)

— **Create or Clone Club Committees:** Before June 30th, be sure to create and/or clone your club/district committees for the next orgyear. *Here's a short training video on Creating/Cloning Club & District Committees:* [DACdb - End a Year Start A Year Part III - Adding Club/District Committees](#)

— **Create Club Events in the DACdb Calendar:** Before June 30th, be sure to update the DACdb Calendar with your upcoming meetings, fundraisers and events. *Here's a short training video on Creating Events in the DACdb Calendar for Clubs & District:* [DACdb - End a Year Start A Year Part IV - Using Club/District Calendar](#)

— **Verify Club billing information:** Before June 30th, be sure to update the billing information to ensure annual bills are sent to the appropriate

individuals. This will prevent late payments and/or discontinuation of service. *Under the My Club tab, click on Admin Functions in the left side menu and click on Edit Club. Under the Address tab, you will want to make sure the correct billing information is added for the Rotary Orgyear.*

District Checklist:

— **RI District Member Compare:** Before June 30th, we find it is helpful to clubs if the District Member Compare report is generated and District Leadership can follow up with the clubs on any discrepancies found in the District Compare Report. If done before June 30th, clubs will be invoiced by Rotary International and the District for the correct number of members. *Here's a short training video on RI District Member Compare: [District Member Compare](#)*

— **RI District Club Officer Compare:** Before June 30th, we find it is helpful to clubs if the District Officer Compare report is generated and District Leadership can follow up with the clubs on any discrepancies found in the District Club Officer Compare Report. *Here's a short training video on RI District Club Officer Compare: [District Club Officer Compare](#)*

— **Review District Member Security Levels:** After July 1st, we recommend reviewing the security levels of users Level 5 and higher within the District and make sure the appropriate level is set for the members. The District Leadership Team security levels are manually set under the Login tab in the member record and will remain the same level until it is manually updated to a lower level. [Click here](#) for the list of Security Levels or visit the Support/Learning tab, click the submit ticket button and in the search bar type "DACdb Security Levels".

— **District Governor Visits added to Calendar:** Before June 30th, we find it is helpful to begin entering the DG Visits to the internal DACdb Calendar. [Adding DG Visits](#)

— **Update District Templates:** By July 1st, the District should update the District Templates for the auto-generated emails like Birthdays, New Member Welcome, etc.. *Here is a short training video on Updating District Templates: [End A Year Start Another Part VI District Templates](#)*

— **Verify District billing information:** Before June 30th, be sure to update the District's billing information to ensure annual bills are sent to the appropriate individuals. This will prevent late payments and/or discontinuation of service. *Under the Address tab, you will find the Billing Address fields to update along with the billing email.*

— **Create or Clone District Committees:** Before June 30th, be sure to create and/or clone your district committees for the next org year. *Here's a short training video on Creating/Cloning Club & District Committees: [DACdb - End a Year Start A Year Part III - Adding Club/District Committees](#)*

— **Create District Events in the DACdb Calendar:** Before June 30th, be sure to update the DACdb Calendar with your upcoming meetings, fundraisers and events. *Here's a short training video on Creating Events in the DACdb Calendar for Clubs & District: [DACdb - End a Year Start A Year Part IV - Using Club/District Calendar](#)*

— **District Governor Awards:** Before June 30th, be sure to update the District Governor Awards with your next org year activities. *Here's a short training video on Governor Awards: [DACdb - Governor Award - 5/9/2023](#)*

— **District Area/Regions:** Before June 30th, be sure to clone and update the District Areas/Regions with your next org year Assistant Governors and District Leadership. *Here's a short pdf on District Areas/Regions: [District Areas/Regions](#)*