



## **Club Positions End-User Guide**

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## 1. Overview

This document covers in some detail the Club Position changes made on DACdb. Specifically, you will notice changes associated with:

### Club Officers

- The way you enter club positions for a member.
- The ability to define the attributes associated with a Club Position at the club level.

### District Admin

- The way you administer the club positions under ADMIN.
- The visibility you have to club positions by different OrgYear(s)

### 1.1 Why Change?

We completely understand why very few people like “change”, but in some cases – change is necessary and will lead to a vastly simpler solution for everyone. We believe this is the case here with the new Club Positions. The way club positions work in DACdb is problematic as best:

- **Multiple Club Positions.** It was difficult for a member to hold multiple club positions. When it was done, multiple position combinations must be added to an administrative lookup table (e.g., S/SE – Secretary/Secretary-Elect, T/PE - Treasurer/Pres-Elect, T/TRF - Club Treasurer/Foundation Chair). The position combinations were endless, making it impractical to keep up with all the necessary combinations that a club wanted to use.
- **Club Leadership History.** Club Leadership History could not be tracked. Prior to this implementation, the club leadership was defined for one year – and vaguely defined for the next OrgYear using “-elect” designations on primary positions. Prior year leadership was lost – club leadership history could not be displayed.
- **Future Leadership.** Future club leadership can now be clearly planned. DGN and DGEs did not have good visibility into the leadership during their term.
- **Club Position Sorting.** Club Position sorts were not flexible. DACdb defined the sorting of some positions, but Districts and Clubs could not really implement their own sorting logic.
- **Year-End Processing.** Year-end processing is difficult. The roll-over processing – promoting the “-elect” positions to officers in the New Year was difficult.
  - Clubs jump the gun – promoting prior to June 30
  - Clubs don’t identify (correctly) future roles
  - Process can step on club changes – make a MESS!!
  - Process is not 100% perfect
- **Mid-year Changes.** Changes to Club Officers can now be tracked based on a start and end date. While this is typically going to be around an OrgYear boundary, in some cases it may not be. Changes can now be made to the start/end date and not fixed to an OrgYear boundary.

Thus, the changes we are making today are intended to address the issues identified above.

## 1.2 What Change?


The following changes were made:

- Every Club Position is date-effective – start and end date. Positions can be entered for future dates and/or past dates.
- Multiple club roles can be set per member – without having to add the combination to the club position lookup table.
- Each club position can be a custom name. By default, the club roles found in the lookup table is used – but the string of names can be changed by the user.
- A simple checkbox selection is used to pick one or more club position roles in the club. The user does not have to be concerned about or know about RoleKeys and how that all works.
- “IsLeader” checkbox can be set/reset. This gets the member listed at the top of the MyClub listing.
- Club Position sorting position can be changed. Each club can tailor the sorting sequence to arrive at a sorting sequence that works best for the club.
- Security level associated with a position can be easily changed. Security can be set up to the level of the person setting the security.

## 2. Club Administration

The core processes that you need to manage your club membership is covered in this section. This includes the ability to:


- Add new positions
- Edit current positions
- Delete positions


 **Note:** Adding and updating positions with President-Elect (PE) or Secretary-Elect (SE) will still cause messages to go to RI. If you are playing around – you might want to use other positions.

### 2.1 Adding a new Club Positions

Adding a new position is basically the same process.

**Step #1.** Click the pencil edit ICON to the left of the Member’s name:

	Thacker, Michael W CDP	9	2011-12	Rotary Foundation Chair (TRF)
---	------------------------	---	---------	-------------------------------

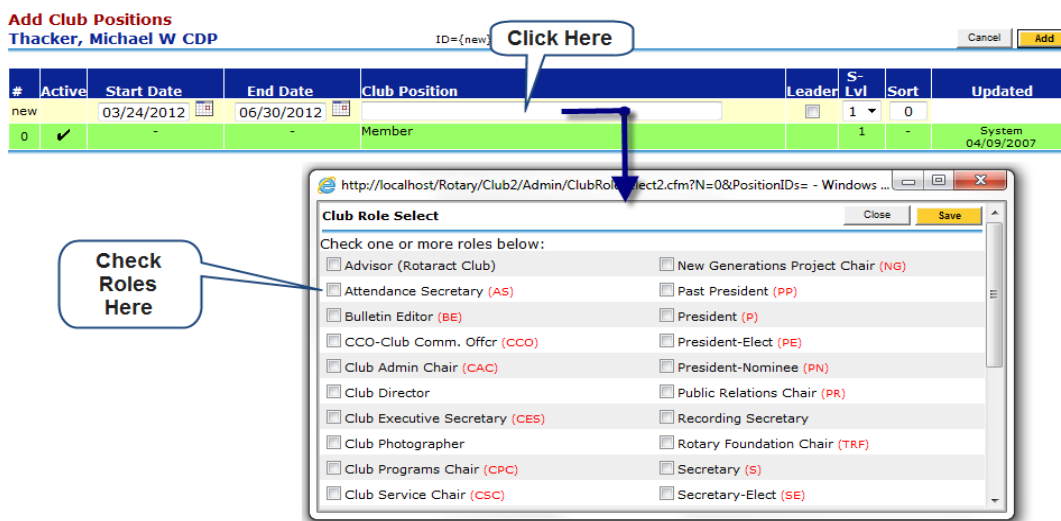
 **Note:** Pop-up blockers must be disabled for this to work.

The next screen that pops-up is the list of current club positions. In many cases, the member has just one position - "Member" listed. The Member is a special position – managed by the system. When a person is not assigned a defined club role – the person is a member. The Member position has no start date or end date. The currently active position is highlighted in Green and has a checkmark in the active column.

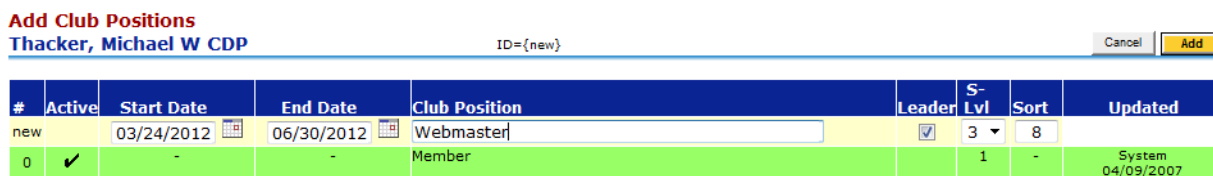
**Club Position Admin**  
Thacker, Michael W CDP ID=1 Close Add

Active	Start Date	End Date	Club Position	Leader	S-Lvl	Sort	Updated
✓	-	-	Member		1	-	System 04/09/2007

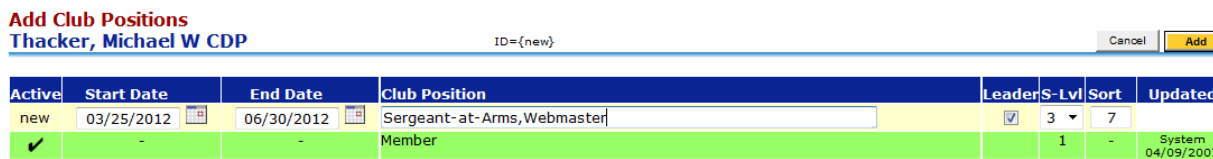
**Step #2.** Click **Add** to add the new position, and then click into the club position area. This causes another pop-up to display, presenting all the defined club roles from the Club Position Lookup table.



Select one or more positions by check the checkbox next to each name. After clicking [Save] on the Club Role Select pop-up, the selected position(s) will be displayed in the club position text area.



If multiple positions were checked (selected), then multiple roles will be shown:



When multiple roles are selected, the Club Position name will be based on alphabetical order of the club position name (we will work to change this in the future).

You will notice that the system will make assumptions about the start and end dates for the positions created. You may need to adjust those dates if the position is some time into the future. By default the start date will be today's date and the end date will be the last day of the current OrgYear period.

Notes:

- **Club Position** – the Club Position is limited to 80-characters.
- **Leader** – if one of the Club Positions is defined to be a leader – the Leader check box will be checked. This gets the member to the leadership listing at the top of the MyClub page.
- **S-Lvl** – the security level will be set to the highest level of the selected Club Positions.

- **Sort** – the sort position (where the member will sort out in the Club Leadership listing) will be the lowest of the positions selected. The lower the sort value – the higher in the listing the member will show.

The Club Position, Leader, S-Lvl and Sort can all be edited at this point.

When the [Add] button is clicked, the position(s) selected will be assigned to the member.

**Club Position Admin**  
Thacker, Michael W CDP ID=1

Close Delete Edit Add Last Add

#	Active	Start Date	End Date	Club Position	Leader	S-Lvl	Sort	Updated
3288	✓	03/25/2012	06/30/2012	New Generations Project Chair Webmaster	✓	3	0	Thacker, Michael W CDP 03/25/2012

## 2.2 Customize the Position

Any position that is created can be changed to any name or title you want. So in the example above, you do not want the Club Position named: New Generations Project Chair, Webmaster and instead would prefer to have a shorter name: NG/Webmaster – that can easily be done by editing the club name and saving the changes. Since this is at the club level, the clubs do not necessarily have to follow the District level naming conventions established in the club position lookup table.

## 2.3 Multi-Year Positions

As it happens, someone remains in the same position for more than one year (sometimes a lifetime). The system can accommodate this in one of two ways.

- Change the “End Date”. Edit the member’s club position record, change the End Date to reflect the length of time the person is expected to be in this position. It can always be changed at a later date.
- Add a new record for the next OrgYear (or several OrgYears, if necessary).

## 2.4 Role Progressions

One entry can generate five (5) positions. The following role progressions are recognized:

- PN, PE, P, iPP, PP
- SE, S
- TE, T

Some clubs have defined a Vice President position as the position prior to becoming the President-Nominee. We did not program this convention into the progression sequence at this time.

**Club Position Admin**  
Thacker, Michael W CDP

ID=1

Close Delete Edit Add Last Add

Active	Start Date	End Date	Club Position	Leader	S-Lvl	Sort	Updated
	07/01/2015	06/30/2016	Past President	✓	4	6	Thacker, Michael W CDP 03/25/2012
	07/01/2014	06/30/2015	iPast President	✓	4	6	Thacker, Michael W CDP 03/25/2012
	07/01/2013	06/30/2014	President	✓	4	6	Thacker, Michael W CDP 03/25/2012
	07/01/2012	06/30/2013	President-Elect	✓	4	6	Thacker, Michael W CDP 03/25/2012
✓	03/25/2012	06/30/2012	President-Nominee	✓	4	6	Thacker, Michael W CDP 03/25/2012

## 2.5 Effective Date Sequence Errors

When entering positions, it is possible that the effective “start” or “end” dates can be entered wrong. To assist in identifying potential errors, the system will flag one or more records with a red “!” on the record(s) that appear to be in error. Note – some human interpretation is required as it may actually be the dates before or after the record being flagged that are actually wrong.

**Club Position Admin**  
Thacker, Michael W CDP

ID=1

Close Delete Edit Add Last Add

Active	Start Date	End Date	Club Position	Leader	S-Lvl	Sort	Updated
	07/01/2013	06/30/2014	Past President	✓	4	1	Thacker, Michael W CDP 03/25/2012
	07/01/2012 !	06/30/2012 !	iPast President	✓	4	1	Thacker, Michael W CDP 03/25/2012
✓	03/25/2012	06/30/2012	President	✓	4	1	Thacker, Michael W CDP 03/25/2012

Warning: One or more date ranges above may be in error. ! The date ranges overlap, are not in sequence or there is a gap.

In the example above, the End Date for the iPast President position is not correct. The dates of the iPast Present overlap with the President dates.

Notes:

Date gaps in positions will be flagged – but these might be correct.

## 2.6 Editing Club Positions

**Step #1.** Click the pencil edit ICON to the left of the Member’s name:

- T -	Thacker, Michael W CDP	9	2011-12	Rotary Foundation Chair (TRF)
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**Step #2.** Click on the [Edit] button.

**Club Position Admin**  
Thacker, Michael W CDP

ID=1

Close Delete Edit Add Last Add

Active	Start Date	End Date	Club Position	Leader	S-Lvl	Sort	Updated
	07/01/2014	06/30/2015	Past President	✓	4	2	Thacker, Michael W CDP 03/25/2012
	07/01/2013	06/30/2014	iPast President	✓	4	2	Thacker, Michael W CDP 03/25/2012
	07/01/2012	06/30/2013	President	✓	4	2	Thacker, Michael W CDP 03/25/2012
✓	03/25/2012	06/30/2012	President-Elect	✓	4	2	Thacker, Michael W CDP 03/25/2012

Make changes to any of the club positions. The Start Date, End Date, Club Position name, Leader, S-Lvl (Security Level) and Sort position can all be changed.



## Edit Club Positions Thacker, Michael W CDP

ID=1

Cancel Update

Active	Start Date	End Date	Club Position	Leader	S-Lvl	Sort	Updated
	07/01/2014	06/30/2015	Past President	<input checked="" type="checkbox"/>	4	2	Thacker, Michael W CDP 03/25/2012
	07/01/2013	06/30/2014	iPast President	<input checked="" type="checkbox"/>	4	2	Thacker, Michael W CDP 03/25/2012
	07/01/2012	06/30/2013	President	<input checked="" type="checkbox"/>	4	2	Thacker, Michael W CDP 03/25/2012
<input checked="" type="checkbox"/>	03/25/2012	06/30/2012	President-Elect	<input checked="" type="checkbox"/>	4	2	Thacker, Michael W CDP 03/25/2012

**Step #3.** Click on the [Update] button to save changes or click [Cancel] to skip making any changes.

The changes you made are saved to the system, and displayed on the screen.

## 2.7 Deleting Club Positions

**Step #1.** One or more positions can be deleted by click on the [Delete] button. Start by clicking on the pencil edit ICON to the left of the Member's name:

- T -	Thacker, Michael W CDP	9	2011-12	Rotary Foundation Chair (TRF)
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**Step #2.** – Click on the [Delete] button.

## Club Position Admin Thacker, Michael W CDP

ID=1

Close Delete Edit Add Last Add

Active	Start Date	End Date	Club Position	Leader	S-Lvl	Sort	Updated
	07/01/2014	06/30/2015	Past President	<input checked="" type="checkbox"/>	4	2	Thacker, Michael W CDP 03/25/2012
	07/01/2013	06/30/2014	iPast President	<input checked="" type="checkbox"/>	4	2	Thacker, Michael W CDP 03/25/2012
	07/01/2012	06/30/2013	President	<input checked="" type="checkbox"/>	4	2	Thacker, Michael W CDP 03/25/2012
<input checked="" type="checkbox"/>	03/25/2012	06/30/2012	President-Elect	<input checked="" type="checkbox"/>	4	2	Thacker, Michael W CDP 03/25/2012

Check the checkbox of the positions that you want to delete. If all the positions need to be deleted, click the checkbox on the header. Uncheck any checkboxes if necessary so that only the positions you want deleted are checked.

## Delete Club Positions Thacker, Michael W CDP

Delete ALL positions

ID=1

Cancel Delete

<input type="checkbox"/>	Active	Start Date	End Date	Club Position	Leader	S-Lvl	Sort	Updated
<input type="checkbox"/>		07/01/2015	06/30/2016	Past President	<input checked="" type="checkbox"/>	4	6	Thacker, Michael W CDP 03/25/2012
<input type="checkbox"/>		07/01/2014	06/30/2015	iPast President	<input checked="" type="checkbox"/>	4	6	Thacker, Michael W CDP 03/25/2012
<input type="checkbox"/>		07/01/2013	06/30/2014	President	<input checked="" type="checkbox"/>	4	6	Thacker, Michael W CDP 03/25/2012
<input type="checkbox"/>		07/01/2012	06/30/2013	President-Elect	<input checked="" type="checkbox"/>	4	6	Thacker, Michael W CDP 03/25/2012
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	03/25/2012	06/30/2012	President-Nominee	<input checked="" type="checkbox"/>	4	6	Thacker, Michael W CDP 03/25/2012

**Step #3.** – Click the [Delete] button to delete the selected positions or click [Cancel] to skip making any changes.

All (or selected) Club Positions can be deleted by clicking on the “checkbox” in the blue header and then checking off (or on) the positions that should be deleted.

If the current position is deleted, the Member will be assigned a normal “member” position.

If gaps in sequence are created as a result of deleting one or more positions, the red “!” will indicate approximately where that gaps are. Gaps in sequence may be perfectly acceptable.

The changes you made are saved to the system, and displayed on the screen. If all the positions are deleted, the member in question will be returned to a “Member” position.

## 2.8 Cloning Club Positions (“Clone Last”)

Another way to take the current position and “clone” it into the next year is to click on the “[Clone Last]” button. So if a Secretary this year is staying on next year -- one click “[Clone Last] will add the position in the next OrgYear.

## 2.9 Club Position Name Convention

There is some flexibility on how Club Position names are shown. By default, selecting multiple roles will list each role separated by a comma. The user creating the position can edit the field, or rename the list of roles to whatever is appropriate.

- Entered as: “Club Director, Webmaster” (note: separated by a comma)

**Club Director  
Webmaster**



**Thacker, Michael W CDP**  
Email: [Mike@MikeThacker.com](mailto:Mike@MikeThacker.com)  
Office: 252-257-2563 Home: 252-257-1401  
Cell: 252-532-1945

- Entered as: “Club Director/Webmaster” (note: no comma)

**Club Director/Webmaster**



**Thacker, Michael W CDP**  
Email: [Mike@MikeThacker.com](mailto:Mike@MikeThacker.com)  
Office: 252-257-2563 Home: 252-257-1401  
Cell: 252-532-1945

- A custom position name, entered as: “Club Dir and WebMaster”

**Club Dir and WebMaster**



**Thacker, Michael W CDP**  
Email: [Mike@MikeThacker.com](mailto:Mike@MikeThacker.com)  
Office: 252-257-2563 Home: 252-257-1401  
Cell: 252-532-1945

## 3. My Club

Several changes were made to My Club when you are updating the club positions.

- The ability to show only the members with club positions (non-member) on the list. For large clubs, this will greatly improve the speed of finding members and making updates.
- The ability to show the positions assigned by the OrgYear. This means who is assigned to what position in future OrgYears can now be easily displayed.
- The ability to show the club leadership history. This is a useful screen to find where positions have not been assigned or to research previous assignments.

Under the Position tab when editing the club, there is a new section that can control Listing Options:

**Club Positions**

This is a list of Club members and their position(s) in this Club. Members get added to this list by being a member of the Club (there is no add link here). Member positions within the club can be edited from this screen, just click on the PENCIL icon.

**Listing Options:**  
 Show:  Only members with club positions?  
 OrgYear: 2011-12  
 Leadership History: [Click Here](#) (Pop-Up blockers must be disabled)

New Display Options

15 members

Edit Club Member Name	Sec-Lvl	OrgYear	2011-12 Positions
- B -			
Bashear, David	3	2011-12	
Brown, Susan W.	4	2011-12	

### 3.1 Show Only Members with Club Positions

Clicking on the “Show [ ] Only members with club positions” will remove all the “Members” from the member listing. Unchecking the checkbox will cause all the members in the club to be listed again.

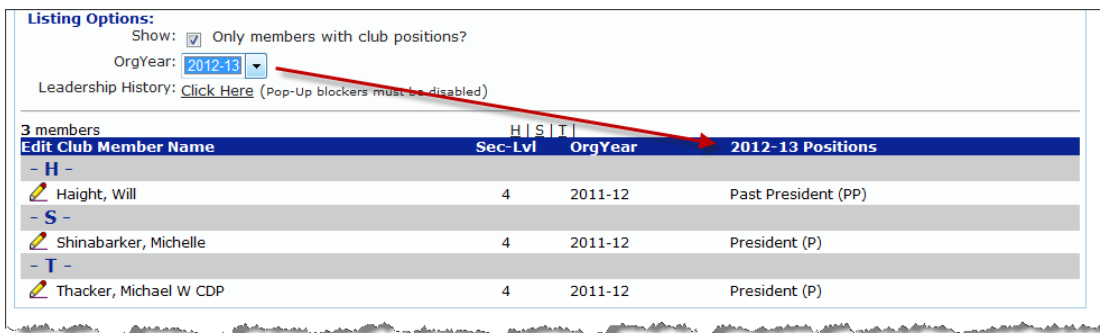
**Listing Options:**  
 Show:  Only members with club positions?  
 OrgYear: 2011-12  
 Leadership History: [Click Here](#) (Pop-Up blockers must be disabled)

7 members

Edit Club Member Name	Sec-Lvl	OrgYear	2011-12 Positions
- B -			
Bugg, Sears	1	2011-12	Vice President (VP)
- H -			
Haight, Will	4	2011-12	iPast President (IPP) Treasurer (S,T)
Hunter, Richard E. Jr.	4	2011-12	
- M -			
Meek, Butch	4	2011-12	Membership Chair (M)
- S -			

### 3.2 Org Year

Changing the OrgYear selection will result in the display showing the members having a club position in that selected OrgYear to show. This also works best in conjunction with the above option to show only members with non-member club positions.



### 3.3 Club Leadership History

It is now possible to construct the Club Leadership. When editing the Club Positions, click on the link shown below to bring up the Club Leadership Matrix. This is similar to the committee leadership matrix on the bottom of some committee listings.

#### Club Leadership History: Green Valley (28499)

Club Position	2010-11	2011-12	2012-13	2013-14	2014-15
President		Friesmuth, Ashley	Margolis, Melinda	Larsen, Jay	Soden, Michael
President- Elect		Margolis, Melinda	Larsen, Jay	Soden, Michael	
Vice President		Larsen, Jay	Soden, Michael		
iPast President			Friesmuth, Ashley	Margolis, Melinda	Larsen, Jay
Secretary-Elect		Ivey, Kent			
Secretary		Manna, Jeff C.	Ivey, Kent		
Secretary-Elect			Manna, Nelda		
Secretary				Manna, Nelda	
Treasurer		Manna, Nelda			
Sergeant-at-Arms			Servino, Jim		
Club Director		Ivey, Kent Servino, Jim Skaggs, Larry Smith, Christine Soden, Michael Soden, Michael L. (Term)	Johnson, Susan Holland Rocheleau, Michael Rock Skaggs, Larry Smith, Christine		
Public Relations Chair		Soden, Michael			
Membership Chair			Peterson, Mike		
Rotary Foundation Chair		Johnson, Susan Holland	Johnson, Susan Holland		
Past President		Frey, James Peterson, Mike	Peterson, Mike	Friesmuth, Ashley	Margolis, Melinda

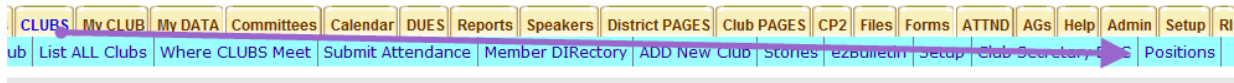
The default view at this time is one year back, current year and three years into the future. We will make adjustments to this down the road. The one year-back will make more sense after 7/1/2012.

## 4. District Level Support

Since all the club positions roll-up to the district-level, it is now possible for the District Administration staff to easily view all (or selected) Club Positions for any OrgYear. This means the DGE’s can now look at next year’s Club Positions and see who the Club Officers are going to be. More importantly, they can see which clubs have not yet identified the club officers in their OrgYear of service. Likewise, the DGN can gain some insight into their year of office two years out.

### 4.1 Club Listing

The Club Listing report shows all the club positions across all clubs. By default, the President, Secretary and Treasurer (RoleKeys: P, S, T) are shown. All positions can be shown by removing the RoleKeys – or other RoleKeys can be added.



**Club Positions**

**Parameters:**

Period: Active Refresh

RoleKeys: P,S,T Filter by RoleKeys (e.g., P,S,T), otherwise leave blank

Type of Report:  List  Pivot

Sort By:  Member Name  Position  Sort-Seq

**Club Positions: District 5300 - Active** Edit

Club	Member Name	Club Position	RoleKey	Ldr	S-Lvl	Sort	Date Range
<b>Alhambra</b>							
	Greenberg, Laura C. (1164)	Secretary	S	<input checked="" type="checkbox"/>	4	3	07/01/11-06/30/12
	Poon, Raymond (1171)	President	P	<input checked="" type="checkbox"/>	4	1	07/01/11-06/30/12
<b>Altadena</b>							
	Gorton, James A. (1174)	Secretary	S	<input checked="" type="checkbox"/>	4	3	07/01/11-06/30/12
	Hill, Anthony J. J. (1177)	President	P	<input checked="" type="checkbox"/>	4	1	07/01/11-06/30/12
<b>Antelope Valley Sunrise</b>							

It is also possible at this level to make changes to the Leader (Ldr), Security Level (S-Lvl) and Sort positions across all clubs by click on the [Edit] Button. Changing any field will immediately update the values – without having to click an Update button.

**Club Positions: District 5300 - Active** Edit

Club	Member Name	Club Position	RoleKey	Ldr	S-Lvl	Sort	Date Range
<b>Alhambra</b>							
	Greenberg, Laura C.	Secretary	S	<input checked="" type="checkbox"/>	4	3	07/01/11-06/30/12
	Poon, Raymond	President	P	<input checked="" type="checkbox"/>	4	1	07/01/11-06/30/12
<b>Altadena</b>							
	Gorton, James A.	Secretary	S	<input checked="" type="checkbox"/>	4	3	07/01/11-06/30/12
	Hill, Anthony J. J.	President	P	<input checked="" type="checkbox"/>	4	1	07/01/11-06/30/12
<b>Antelope Valley Sunrise</b>							
	Schultz, Karen	Secretary	S	<input checked="" type="checkbox"/>	4	5	07/01/11-06/30/12

## 4.2 Club Pivot

The “pivot” version of the Club Position listing will create a column for every club position across the top, with each club listed down the left side. This makes for an easy way to identify missing club positions in the OrgYear selected.

**Club Positions**

**Parameters:**

Period:

RoleKeys:  Filter by RoleKeys (e.g., P,S,T), otherwise leave blank

Type of Report:  List  Pivot

Sort By:  Member Name  Position  Sort-Seq

**Club Positions: District 5300 - Active**

Club	President	Secretary	Treasurer
Alhambra	Poon, Raymond	Greenberg, Laura C.	
Altadena	Hill, Anthony J. J.	Gorton, James A.	
Antelope Valley Sunrise		Schultz, Karen	
Apple Valley	Nassif, Scott	Abbott, Catherine	
Arcadia	Miller, Dr. Brad	Lamb, John F. F. Jr.	Grant, Roger J.

## 5. Conversion Process

The initial conversions are being done on a district-by-district basis. This has worked well in the past and is the approach of choice again here. Once a handful of districts are up and running successfully, we will convert the remaining districts.

### 5.1 Pre-Requisites

Before your District can be converted to the new club positions, your Club Position Lookup table probably needs to be updated. At a minimum; take time to review the table for the following conditions:

- The “Member” position should not be included in you Club Position list. (If someone is not one of the club positions on this list – then they are a Member by default.)
- Each position should reflect only one position. Do not create dual positions such as “Secretary-Treas-Elect” that would have two (or more) RoleKeys. In this case, there should be two positions – a “Secretary” position with RoleKey “S” and a “Treasurer-Elect” position with RoleKey “TE”.
- Each position should have one and *only one* RoleKey assigned. The RoleKey must be unique across all the positions – so positions can be found by using the RoleKey..
- If you want to capture club position changes in committee, make sure you establish the committees in future OrgYears. These should be, at a minimum, the P, PE, IPP, PP, S, SE, T, TE committees.

### 5.2 Post Conversion

After doing the conversion, we will remove access to the Club Position table you formerly updated. The table that you would now add new positions to is the Club Position Lookup.



### Club Functions (Level 6+)



~~Club Positions~~

- Club Position Lookup DCO's - Update this table!
- Club Type
- Club User Defined Fields
- Convert Club Records

## 6. Roll-Over Processing

The Year-End roll-over processing will change substantially with the new club positions. Basically, there is no roll-over processing for club positions on June 30<sup>th</sup> of each year. Each club defines a start and stop effective date for each position.

### 6.1 Nightly Roll-Over

Each night a system-wide process will run looking for club positions that need to change. This will happen when the start date of a position was defined to start on a specific day.

### 6.2 Year-End Roll-Over

The June 30<sup>th</sup> roll-over processing is just another day of nightly roll-over processing. The only difference is instead of a handful of positions that might change each night; the June 30<sup>th</sup> run will make tens of thousands of club promotions (and demotions) that night.

The June 30<sup>th</sup> processing will include the committee promotions we have done in the past.



## 7. Club Position Lookup

The source of all the club positions is the Club Position Lookup under the Admin menu tab.

Each District has its own set of club positions it can define for all clubs. No longer are there system-level positions that DACdb defines and/or controls. Each District can set and define its own list of club positions.

**Club Position Lookup Admin**

View Add Delete Edit

ID	Club Position	Is Active	Position Sort	Position Security	Leader Position	Role Key	Modified	Created
7002	Administration Chair	✓	13	3-Event Manager	✓	AC	Soden, Michael 03/15/2012	Soden, Michael 02/23/2012
1585	Attendance Secretary	✓	5	3-Event Manager	✓	AS	Soden, Michael 03/15/2012	Lowery, Jamie 02/09/2011
1584	Bulletin Editor	✓	7	3-Event Manager	✓	BE	Soden, Michael 03/15/2012	Lowery, Jamie 02/09/2011
1568	CCO-Club Comm. Offcr	✓	7	4-Club Officer	✓	CCO		Lowery, Jamie 02/09/2011
1575	Club Admin Chair	✓	7	3-Event Manager	✓	CAC		Lowery, Jamie 02/09/2011

Note:

- DO NOT include a “Member” position. (When someone is not one of the positions on this list they are a Member.)
- DO NOT overload a position (e.g., Club President/Sec-Elect). Each Club Position should stand on its own.
- Each Club Position should have only one RoleKey value.
- Each RoleKey should be unique across all the positions.

## 8. Questions and Answers

### 1. If our President resigns, what do I do?

There are several ways this can be handled – the question is whether you want to retain a record of the resigning President’s tenure?

- a) Go into the current President’s record and set the End Date. Then create a new President record for the member now becoming the President. Both the current and new President will be shown in the leadership matrix.
- b) Delete the President record from the President that resigned. The down side here is there will be no history of that person being the President.

### 2. If the Secretary is staying on for another year, what do I do?

You have three options:

- c) Change the effective end date of the Secretary’s position to the end of the following year (add another year)
- d) Clone the last year – making a new club position for the following year
- e) Add a new position, and select Secretary as the position.

### 3. When I edit my Club Positions, I see the member name listed twice. What’s up with this?

Since the edit routines can list positions by different OrgYears, you have added two rows of club positions for this year. Only one row is allowed at a time.