

From the Bay to the Hills

Rotary
District 9810



BE THE INSPIRATION

Technology Committee

Status Review and Action Plan

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1 Overview

1.1 Background

The 2015/16 Board determined that the District's web site needed updating with improved features and capability. In 2017 DGN Russell Gurney invited several Rotarians to form a Technology Committee to review and make recommendations to District and Clubs regarding their current and ongoing use of technology.

1.2 Current Situation

The Technology Committee recommended ClubRunner as the preferred website and database system. This recommendation was accepted by the District Board and the website was announced to the Club Presidents and publicly released on Friday 3rd August 2018.

The ClubRunner system provides the following features and facilities:

- A modern looking public-facing website, that –
 - is simple to use,
 - has a powerful search facility,
 - provides options to print content or send information to email or mobile phone.
- A District club and member database that -
 - automatically synchronises with the databases of RI and clubs with compatible systems,
 - may be updated directly by authorised personnel for all clubs, whether they use a membership management system integrated with RI's database or not,
 - forms the basis of an always up-to-date District directory, both in online and printable forms.
- Online document and photograph repositories.
- A secure area protected by login, for use of District and Club officers and ordinary Rotarians. Multiple levels of access are available, defined by user roles (eg Club Secretary, District Committee Chair, etc). Roles may be defined for future years and are automatically rolled over at change of Rotary years.
- An online event calendar.
- Online newsletters, with content that may be shared between the newsletters and the website.
- A facility for District and Club executives and ordinary members to send and record emails, utilising built-in or personally customised address lists. Emails issued via this facility are retained for future reference.
- Automated reporting at District and Club levels. Built-in and custom reports are available.
- An associated mobile phone / tablet app that lets all D9810 Rotarians access their Club members and District officers' contact information, as well as the District event calendar.

1.3 Where to from here?

Now that the ClubRunner implementation is essentially complete, the Technology Committee would like to hand over ongoing operation of the website, newsletters and back-end functions to other personnel and move on to investigating other aspects of technology to assist the District and Club operations.

2 Recap of the Current Situation

2.1 ClubRunner

- The website was set up initially by copying content from the previous District website and then having committee chairs and other responsible parties review and update the content to ensure it is current. An initial article for the home page was copied from a recent "*Highlights*".
- The club and member data were initially set up from a copy of the Access database maintained by *Tim Bray* and were as current as we could achieve AT THE TIME.

We have undertaken a drive to get all clubs to allow ClubRunner to access their member data from RI. At the time of writing 28 out of 44 Clubs have done this and several others are in the process. As more and more clubs do so, we get closer to the ideal of 100% compliance and accuracy.

Tim Bray is still responsible for the offline database. Clubs submit updates for inductions, resignations, Rotary recognitions and changes of members' details to him via email, phone call, etc. The database managed by Tim will remain the 'source of truth' until such time as we are able to get all Clubs to synchronise their ClubRunner data with RI's records.

- Entries for the ClubRunner event calendar were initially solicited from District committee chairs and copied from the most recent "*Highlights*" current at the time of publishing the website. *Michael Ellinger* has taken on the role of maintaining the online event calendar.
- The email facility is available, but we still need to set up distribution lists and get people to use it.
- The mobile app is available, but has not yet been publicised to Rotarians, other than those in existing ClubRunner clubs.
- The role of webmaster is currently undertaken by *Tim Lynn*. During the development phase he was assisted in setting up the content by *Peter Dalwood*, *Gus Rozycki* and *Joady Barnes*, with some additional advice on design aspects from *Kathie Thomas*, *Shia Smart* and others.

Since putting the website online, *Gus* and *Peter* have handed over day-day website maintenance to the rest of the team, and now only intervene on request. *Tim Lynn* has full administrator access and can give editing rights to other contributors as and when required.

- *Alex Vladica* of Digital Innovations, who was responsible for hosting and managing the previous district website, has been retained in the role of Domain administrator.

2.2 District Newsletters

There are several publications produced regularly:

- "*Highlights of D9810*" (Club and District events) – circulated to all D9810 Rotarians and interested parties
- "*District 9810 News*" – circulated to all D9810 Rotarians and interested parties
- *DG newsletters* – circulated to D9810 Past District Governors

Currently all of these are distributed as rich-text emails or pdf attachments, using *Constant Contact*.

The first two are edited by *Michael Ellinger* and the DG newsletters are edited by *Gordon Pyke*.

The subscriber lists for each newsletter are maintained independently of each other and the District member database. Subscribers may update their own information by clicking on links in the emails.

No online bulletins have been set up in ClubRunner yet. We would like to encourage the above newsletter and website editors to experiment with this facility with a view to adopting it in future.

2.3 District Conferences

Website – The website used for past District Conferences is custom built and hosted by a separate vendor. Content management is passed from one year's committee to the next each year.

Bookings & payments – Bookings for the annual conference are taken via *Trybooking.com*. Data about the finances and booking details are extracted as PDF reports and Excel spreadsheets. Attendance badges are formatted and printed using facilities provided by TryBooking.

In 2019 D9810 will be participating in a multi-District conference and is not responsible for the website or bookings. **THIS MAY PROVIDE US WITH AN OPPORTUNITY TO REVIEW OUR DISTRICT'S CONFERENCE MANAGEMENT TECHNOLOGY BEFORE WE NEED TO START SETTING UP FACILITIES FOR THE 2020 CONFERENCE.**

2.4 District Social Media

There are Facebook pages for

- District
- District Conference
- RYLA
- Rotary Exchange
- Sustainable Communities committee.

District does not have any formal presence on other social media.

2.5 District Finances

The District Treasurer is *Neil White*. The accounts are maintained in MYOB Cloud version, managed by *Don Kinnear*.

2.6 Document Storage and Management

There is no single, central repository. Documents exist in many forms –

- Hard copy,
- The District website,
- Individual personal computers / tablets,
- Email attachments,
- Google Docs, DropBox, OneDrive, ++

2.7 Video Conferencing

During the Rotary Leadership Institute (RLI) training for 2018/19 Presidents-Elect we trialled using *Zoom* as a platform for offering video access to the sessions for attendees who were not able to be physically present. A laptop PC and webcam were purchased for the trial. These are currently being held by *Peter Dalwood*.

2.8 Other District IT-related Facilities

There are a number of District personnel who have use of equipment owned by District and/or use various online facilities; eg PCs used for various tasks and the software installed on them, video-conferencing, DropBox, Google and Microsoft accounts, etc. There does not appear to be any inventory of these assets or strategy for their ongoing management.

2.9 Clubs and District Committees

Each club and committee within the District chooses the technology which best suits its own needs, without much consideration of any benefits that may accrue from sharing with other clubs and the District.

Some of the technologies in use include:

1. **Websites** – there is a mixture of ClubRunner, StreamScape and bespoke websites, many of which utilise WordPress. Some clubs have no website as such, but do have a Facebook page.
2. **Social media** - many clubs have a Facebook page, in addition to or instead of a website. Some also have other social media presences, such as Twitter, Instagram, Pinterest, Linked In, etc.
3. **Newsletters** – newsletters take many forms, including emailed pdf or Word documents, rich text emails (e.g. MailChimp, WordPress, etc.), and paper documents handed out at club meetings.
4. **Member databases** – some clubs use online membership management systems, such as ClubRunner or StreamScape. Tools used by other clubs have not been reviewed.
5. **Club and District Directories/handbooks** – mostly published in printed form.
6. **Club event and project management / finances / document management / video conferencing / other IT functions** – not reviewed.

3 Next Steps with ClubRunner

While the website is now public, there is still much to be done before the ClubRunner implementation may be considered complete:

1. The first, and most urgent task, is to get ALL D9810 clubs to turn on data integration:
 - The first step requires an authorised Club executive (ie Secretary / President) to log on to the “My Rotary” Club Administration page and designate ClubRunner as a District management vendor. **Action: DG Russell Gurney**, in his emails to Presidents and official Club visits, is requesting cooperation in undertaking this first step.
 - Once the first step has been done, a checkbox becomes available on ClubRunner. This needs to be checked to start synchronisation. The checkbox may be activated by an authorised Club OR District representative. When both RI and CR ends of the process are working, any data conflicts are highlighted and need manual intervention to resolve them. **Action: Peter Dalwood** and **Gus Rozycki** are monitoring clubs who have turned on integration at the RI end, assisting them to perform the CR integration step or doing it on their behalf and discussing the resolution of any data discrepancies with the club secretaries. *Tim Bray* is being kept informed regarding overall progress and any specific data changes which are made.
 - When all clubs have integration set up and either they or District are regularly monitoring the data for issues, we may safely retire the Access database.
 - We will need to incorporate information about this function into the ongoing PE and Club Secretary training programs. **Action: Peter Dalwood** will talk to *Diane Fisher* about incorporating appropriate material into the RLI course and Secretary training.
2. The personnel responsible for ongoing administration of the District website, newsletters, events and membership data need to be identified and trained in using their particular components of ClubRunner. These include –
 - District secretary *Alma Reynolds* and any assistants she may need.
 - The website management team – webmaster *Tim Lynn*, assisted by *Joady Barnes* and other assistant editors as appointed by Tim.

It is important that there be at least two (preferably more) people to ensure we have all the requisite skills covered and the website is never dependent on just one person to keep it maintained. The content needs to be frequently and regularly turning over to keep the site current, active and engaging for members and the public.

 - Newsletter and events editor *Michael Ellinger*.

For the same reason as above, it would be good to have at least two people on this team also.

 - District committee chairs and/or nominees
 - The G-Train and other District executives

No immediate action – can be deferred for now.
3. The website is now public, but still requires some more fine-tuning in the overall style, layout of the menus and content of some pages, as well as needing a regular turnover of current home-page stories.
 - Copies of RI style guides and other publications relating to setting up Club and District websites have been saved in the Technology Committee shared DropBox and passed on to the website team for their consideration.
 - We need to set up a regular website style/content review process (say every 3/6 months) with committee chairs and other relevant content sources.

- The **District Communications committee** is responsible for sourcing stories from Clubs and district committees for publication on the website and in newsletters.
- 4. *Michael Ellinger* will continue to use his current processes for building and circulating the editions of both *Highlights* and *D9810 News*. He will also experiment with using the eBulletin functions in ClubRunner, constructing one or more trial bulletins and circulating them to a limited audience for evaluation, until we are all comfortable with the product.
- 5. When all of the above have been completed, other things to investigate and configure in ClubRunner are:
 - Set up any email distribution lists we may need.
 - Try out the reporting functions in ClubRunner and set up what we want as ongoing District reports.
 - Set up whatever else we need in ClubRunner to replace next year's printed handbook.

4 Next Steps beyond ClubRunner

The Technology Committee now wants to turn attention to some other IT-related issues. The first and most urgent of these are:

- Establish role-based email addresses for District officers that can be rolled over each year as the incumbents change.
- Investigate and make recommendations to the Board about appropriate electronic mechanisms for storing, archiving and retrieving District documents, particularly those related to Working with Children.

As a first step towards both above aims we are in the process of setting up a trial implementation of the Microsoft 365 Business cloud-based IT services. As a not-for-profit entity registered with the ACNC, District is entitled to this service for free. The package includes, among other things –

- PC, Android, Mac, iPhone and browser-based versions of all Office products
- Personal and shared email accounts
- Up to 1Tb of OneDrive cloud storage per registered user
- Sharepoint
- Yammer
- etc

To help us complete this evaluation we need to recruit more members onto the Technology Committee.

Other items on our 'to-do' list include:

- Develop the processes we trialed last year for online meetings and seminars. This could include –
 - RLI sessions
 - District-wide seminars (eg Foundation, etc)
 - Board meetings
 - District Assembly
 - Recording key events as online videos accessible via the website.
 - etc.
- Establish an inventory of District owned IT-related equipment, software and online resources and the personnel who have possession or access to them.
- Perform a gap analysis of the weaknesses in our technology and develop strategies for improvement.