



Rotary Club Secretary

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Rotary Club of Carlisle-Sunrise
“Secretary for Life”



Rotary Club Secretary Basics



- As club secretary you help your club run smoothly and effectively. You also monitor club trends to help identify strengths and areas for improvement, and share this information with club and district leaders. *Outside the Club President, you should be the most knowledgeable person in the club.*
- **What you do**
 - Maintain membership records: [Update your club membership data](#). Your club invoice is based on the number of members in Rotary's database for your club as of 1 July and 1 January. Rotary International sends the club invoice by email and mail. Save paper by [opting out](#) of the paper (mailed) version.
 - Annual District dues are invoiced 1 July, based on 31 December numbers
 - Maintain minutes of club, board, and committee meetings
 - Work with incoming secretary to ensure smooth transition



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- **What you do (con't)**

- Daily – Monitor your email to answer questions/provide information to the president/Club members or District as required
- Weekly –
 - Check PO Box for correspondence and respond/distribute as appropriate
 - Attend weekly meeting (visitor sheet/make-up card; record attendance; speaker gift; record notes from speaker)
 - Prepare email notice of next meeting (calendar, speaker notes, duties)
- Monthly –
 - Report Attendance to District on ClubRunner
 - Develop agenda and minutes for board meeting.
 - Send to the Board on Monday before the meeting.
 - Attend Board meeting.
 - Create minutes following the meeting.



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• What you do (con't)

- Annually –
 - In October, ICW the president and president-elect, develop ballot for new club leadership for Nov/Dec vote
- As required –
 - Maintain a complete membership roster, membership number list and birthday/anniversary roster, email distribution list, badge box roster, updating them when members come and go
 - Order as required:
 - Speaker gifts
 - Visiting Rotarian Make-Up Cards (National Award)
 - Club exchange banners (National Award)
 - New member kits (Russell Hampton)
 - Reusable Name badges (National Award)
 - Past-president pin (in May before new Rotary year begins) (National Award)
 - Felt banner for Exchange banners (Russell-Hampton)
 - Attend District events
 - Prepare general club information letter for a perspective member



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• What you do (con't)

- Receive new member proposals and forward to the Board for approval; then to the club members
- New member orientation and preparation
 - Once a new member is approved, enter data to the RI website to obtain their Rotary member number. Synchronize with Club Runner membership list.
 - In addition to the general new member packets mentioned above, you will need to print:
 - the new member name on the 'certificate-suitable-for-framing' that comes in the packet
 - the new member's name for the name tag
 - a copy of the classification talk guidelines
 - a copy of the president's letter
 - two (2) copies of the mentor letter – one for the new member and one for the mentor (normally the sponsor)
 - establish a ClubRunner account login and password
 - Update all the rosters described above and print a new badge box roster
 - Provide new member information to:
 - President
 - Membership Chair
 - Treasurer
 - Past President (who will schedule new member orientation)
 - Speaker program chair (to schedule classification talk)



Rotary Club Secretary Basics



- **How to prepare**

- Take online courses for club secretary in the [Learning Center](#)
- Attend district learning assembly
- Work with outgoing secretary

- **Resources & reference**

- [Be a Vibrant Club: Your Club Leadership Plan](#)
- [Standard Rotary Club Constitution](#)
- [Recommended Rotary Club Bylaws](#)



Rotary Club Secretary Basics



- **My Rotary Learning Center Modules (15-30 minutes each)**
 - Getting Started with the Learning Center
 - Get Ready: Club Secretary **
 - Managing Club Business **
 - Working with your Club Leadership Team **
 - Minimizing Risk
 - Rotary Club Central Resources
 - Online Membership Leads
 - Protecting Personal Data
 - Preventing and Addressing Harassment
 - Rotary's Action Plan and You

** Secretary Specific



Rotary Club Secretary Basics



- **Tools**

- [Pay or view your club invoice](#) (Rotary International dues and fees)
- [Update your club membership data](#)
- Set and track goals in [Rotary Club Central](#)
- Check RI [discussion group](#) for club secretaries

- **References**

- <https://my.rotary.org/en/learning-reference/learn-role/secretary>
- https://learn.rotary.org/members/learn/learning_plan/view/6/club-secretary-basics

- **Resources**

- Melissa Kopp-Smith, District Secretary, office@rotary7390.org , 717-854-7842