



INFORMATION FOR THE SECRETARY

District Secretary

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Club Secretary the backbone of the Club

You are much more than just administration!!

You are the right hand to the President who will be relying on you during the next 12 months

You will make their job so much easier

You are the information traffic director within the Club

You are most likely the archivist of Club records, some clubs have an executive secretary who manages this.

**Rotary International
and the
RI South Pacific and Philippines Office**

How they can help you?



South Pacific & Philippines Office

ADMINISTRATION
& LITERATURE

FINANCE

THE ROTARY
FOUNDATION

CLUB & DISTRICT
SUPPORT

In RISPPPO office there are four main departments waiting to assist you:

- Administration and Literature
- Finance
- The Rotary Foundation
- And Club and District Support or CDS

Administration and Literature assists with general enquiries and ordering Rotary International publications

The finance team can help with payment of club invoices as well as receipts for Foundation contributions.

The Foundation team can provide advice about Foundation programs and recognitions. You would speak to them if you have queries regarding Paul Harris Fellow Recognitions.

Club and District Support

- General enquiries
- Obtaining Paul Harris Fellow Recognitions
- Online tools support
- Club administration eg. name change, club closures etc
- Club and member anniversary recognition

They process new club applications – that includes standard rotary clubs, e-clubs, satellite clubs, Rotaract and Interact clubs.

They process applications for change of club names, voluntary club resignations, mergers and other administrative procedures. They also help with RI approvals for club incorporations.

They help with club and member anniversary recognition.

Also deal with the curly questions that Rotarians sometimes have as well the complaints, which unfortunately they get from time to time.

They can also connect you with Rotary International staff who deal with specialised areas such as RI awards.

So that's a general introduction to the RI structure and the RISPPO office.

Rotary International website

Information to help you in your Role as Secretary

Club Administration / Information which is contained in
My Rotary

Login to My Rotary and select Knowledge and Resources

The screenshot shows the My Rotary website interface. At the top left is the Rotary logo and the text "My Rotary". To the right are "Donate" and "Refer" buttons, and a search icon. Below this is a navigation bar with the following items: "My Rotary", "Participate", "Events & Connections", "Knowledge & Resources" (which is highlighted in blue and has an upward arrow), and "Who We Are".

Under the "Knowledge & Resources" menu, there are three main sections:

- Resources & References:** Grants & Services, Fundraising, Resources by Role (with a sub-menu containing "Club and District Administration" which is highlighted with a red box), District Committees, Youth Protection, Policies & Procedures, and a "View All" link.
- Rotary Tools:** Rotary Club Central, Grant Center, Service Project Center, Official Rotary Apps, Brand Center, Licensed Vendors, Raise for Rotary, and Learning Center.
- Webinars:** (This section is currently empty).

On the right side of the page, there is a "Learning Center" section featuring a photo of a man in a white shirt and tie, with the text: "Learning Center. Build new skills with online courses and materials."

Then select Club and District Administration

Club & District Administration



Use the tools and resources below to help you manage your clubs and districts. From updating your membership and paying club dues to seeing contribution reports and locating your coordinator, you'll find everything you need to take care of Rotary business.

What do you want to do?

I want to...



Club Resources

Update Rotary member and club data, pay Rotary club dues, download club sponsorship materials, donate, and find forms and instructions. You can also update Rotaract member and club data.

[MANAGE MY CLUB](#)

Resources & reference

[Be a Vibrant Club](#)
[Strategic Planning Guide \(DDC\)](#)
[Learn about club roles](#)
[Manage Membership 1 week \(PDF\)](#)

Reports

Find club, district, and regional reports for membership, contributions and recognition, Presidential Citation, and program participants and alumni.

[VIEW REPORTS](#)

People & Directories

Find your club and district representatives and regional leaders, locate club meetings around the world in the Official Directory, and learn about Rotary's leadership team.

Regional leaders

[Club & District Support and Financial representatives](#)

[Official Directory](#)

[Rotary leadership](#)

[FAQ & Help](#)

- **Record membership**
- **History of membership**
- **Semi-Annual Dues**
- **Foundation contributions**
- **Enter club goals for Club Excellence Award (formerly Rotary citation)**
- **Downloads**
- **... and much much more.**

Who can update club and member data?

You are authorised to update club and member data if you are a president, secretary, executive secretary/director, treasurer, membership chair, or Rotary Foundation chair and this position has been reported in the RI database.

Your Club information available on the RI website

Club Finances

☆ Club Invoice

View your club's invoice, pay dues with a credit card, or update invoice preferences

[About the club invoice](#) | [Rotary exchange rates](#)

Club Sponsorships

☆ Interact

Sponsor a club for youth ages 12-18.

[Interact club certification form](#) | [About Interact club sponsorship](#)

☆ Satellite Club

A satellite club is a subset of a Rotary club that has its own leaders, meetings, and bylaws.

[Satellite club member information form](#) | [Satellite club application](#) | [Satellite club FAQ](#)

☆ Rotary Community Corps

A Rotary Community Corps is a group of non-Rotarians who carry out and support local Rotary club projects.

[Sponsor a Rotary Community Corps](#)

☆ Twin Club

Commemorate your twin club partnerships.

[Certificate of Recognition](#)

Club Giving

☆ Individual contribution printable forms

Send your individual contribution form to The Rotary Foundation with your check, or as soon as a wire transfer is initiated.

[Individual contribution form](#) | [Prefilled individual contribution form](#)

☆ Multiple donor printable forms

Send your multiple donor form to The Rotary Foundation with your check, or as soon as a wire transfer is initiated.

[Multiple donor form](#) | [Prefilled multiple donor form](#)

Forms & Instructions

☆ **Name Change**

Notify Rotary about a proposed change to your club's name or locality.

[Change of Rotary Club Name and/or Locality](#)

☆ **Merger**

Step-by-step instructions on how to merge two clubs.

[Club merger forms and instructions](#)

☆ **Member Confirmation**

Confirm membership and financial standing for former club members.

[Confirmation form](#)

☆ **Insurance and IRS (U.S. only)**

Access resources about the U.S. Rotary club and district liability insurance program and tax forms.

[U.S. Rotary club and district liability insurance program](#) | [IRS forms and instructions](#)

Official Directory

☆ **Official Directory**
Search clubs and districts in the Official Directory.
[Search](#)

Member Center



What do you want to do?

I want to...

Join us!

Tell us why you're interested in Rotary and we'll help you get started.

I'm interested in:

- Select -

Rotary Global Rewards

Explore our member benefit program for discounts on travel, hotels, dining, and entertainment.

[EXPLORE REWARDS](#)

International Convention



Plan now to attend Rotary's biggest event of the year. It's your chance to connect with members from around the world.

[REGISTER](#)

Refer a new member

Refer a potential member and we'll help connect them to the right club. Only current members can refer new members. To refer someone to your own club, contact your club secretary.


Online Tools

[Rotary Club Central](#)
[Brand Center](#)
[Rotary Showcase](#)
[Rotary Ideas](#)
[Learning Center](#)

Goal Recording for Club Excellence Award use Rotary Club Central

[My Rotary](#) ^ [Participate](#) v [Events & Connections](#) v [Knowledge & Resources](#) v [Who We Are](#) v

Club Central Melbourne (Rotary Club) Change or Rejoin Club Club Resources	Membership and Foundation Reports Rotary Club Central ↗ Refer a New Member	Travel and Expenses Awards & Recognition Awards Membership Society Club Excellence Award Donor Recognition ↗	Community Marketplace Club Management Systems Official Rotary Apps
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Rotary Club Central [↗](#)
Set club goals and track how you're doing.

Path to info



KNOWLEDGE AND RESOURCES



RESOURCES BY ROLE



LEARN BY ROLE



CLUB ROLES

Secretary

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.

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.
- Maintain minutes of club, board, and committee meetings
- Work with incoming secretary to ensure smooth transition

How to prepare

- Take online courses for club secretary in the Learning Center
- Attend district training assembly
- Work with outgoing secretary

Resources & reference

- Be a Vibrant Club: Your Club Leadership Plan
- Standard Rotary Club Constitution
- Recommended Rotary Club Bylaws

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 our discussion group for club secretaries

Rotary support

- Outgoing secretary
- Club and district leaders
- Club and District Support representative
- Financial representative

Path to in online modules



KNOWLEDGE AND RESOURCES



ROTARY TOOLS



LEARNING CENTRE



CLUB LEADERSHIP



SECRETARY

Club Secretary Basics
8 courses

0% Learning Plan Progress
1h 20m | 1h 20m

About this Learning Plan
Learn about your role as club secretary, how to work with club leaders, and how to manage your club's membership and administrative data.


- Get Ready: Club Secretary**
Learn about your role as club secretary, online tools to manage club and membership information, and questions to consider to prepare for your role. **8 Learning | 15m**
- Club Administration: Club Secretary**
Learn about reporting procedures for club and membership data, preparing for district events, and information on your club constitution and bylaws. **8 Learning | 30m**
- My Rotary: Club Administration**
Download three guides to learn how to report club office, and member changes on My Rotary. Guides can also be shared with your leadership team. **8 Learning | 15m**
- Working With Your Club Leaders**
Learn how to perform tasks during your year and work with club leaders to organize club activities. **8 Learning | 30m**
- Using a Club Management System**
If you plan to use a club management system, learn how to select a vendor and ensure that it accurately sends your club information to Rotary. **8 Learning | 15m**
- Managing Club Finances: Club Secretary**
Learn about club and district financial obligations including paying club invoices and how to manage Foundation contributions. **8 Learning | 15m**
- Online Membership Leads**
This course will help you learn how membership leads work, how to turn leads into members, and how to create a consistent, positive experience for prospects. **8 Learning | Duration: 1h**
- Rotary Club Central Resources**
Ready to set some goals? Check out the resources we have to help you manage your goals and service activities. **8 Learning | 15m**


**Information on the
District Website**

www.rotarydistrict9800.org.au




Search Member Login

Rotary 
District 9800

 **THE MAGIC OF ROTARY**

Vision: We Belong to Serve
Purpose: Inspire, support, encourage and engage Rotary Clubs and Members in District 9800 to thrive
Values: Respect; Empathy; Honesty; Integrity; Ethical; Relevance

 District - Projects in Action Members - Foundation - Programs - More -

ClubRunner

[Home](#)


Enter your login information below:

Login Name [Forgot login name?](#)


Password [Forgot password?](#)

Keep me logged in [New user?](#)

Search
Marjorie GERLINGER OAM | Member Area | Logout




Rotary
District 9800



THE MAGIC OF ROTARY

Vision: We Belong to Serve
Purpose: Inspire, support, encourage and engage Rotary Clubs and Members in District 9800 to thrive
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 District ▾
Projects in Action
Members ▾
Foundation ▾
Programs ▾
More ▾


Latest

District Registration

Catch up on the Magical Minute

Ground District 9800

2025 Rotary Emergency Services Community Awards Now Open



Emergency Services Community Awards

District 9800 is proud to be a valued partner and sponsor of Victoria RESCA and happy to advise that the 2025 Award nominations are now open. The organisers are keen to promote the event as widely as possible to encourage and receive as many nominations from all the emergency services agencies as possible.

[Read more](#)

Upcoming Events

District Learning and Engagement Forum
Torrens University
May 04, 2025
9:00 am – 1:00 pm

Rotary North Balwyn's Golf Day
May 09, 2025 7:30 am

2025 Multi-District Impact Summit
Morphettville Racecourse
May 16, 2025 – May 18, 2025

- District Information
- District Events
- DGEN Team
- Secretary
- Treasurer
- Club Service
- Governance
- Insurance
- Learning & Development
- Membership
- Networker
- Public Image and Communication
- Speaker Bank
- Photo Albums

District Information

District Information

District Organisation

District Support Team

District 9800 Clubs

District Governor Nomination

District Geography

District History

Past District Governors

RI Presidents and Themes

District 9800 Acknowledgement of
Country and Inclusivity Statement

Downloadable files

District ByLaws

District Admin Manual

What to Send – to Whom and When

REGISTERED OFFICE

Rotary District 9800 Inc., c/- District Secretary, Ground Floor, 470 St Kilda Road Melbourne Vic 3004
Registered Number: A0046132N ABN 30 764 979 582

ADDRESS ALL DISTRICT MAIL TO

District Secretary: Marjorie Gerlinger OAM
Mobile: 0419 302 109
Email: marjorie.gerlinger@rotary9800.org

AUSTRALIAN ROTARY HEALTH FUND DONATIONS

ARH, PO Box 779, Parramatta, NSW 2124
Copy to District ARH Chair: Dr Suresh Marcandan
Email: suresh@stellamarisinternational.com

CLUB BULLETINS

Send one electronic copy each week to: clubbulletin@rotary9800.org
This is a shared mailbox where all District personnel can access your Bulletin.

Insurance Documents

Insurance

District Policies

Governance

District 9800 Rules

District Code of Conduct

Rotary International Downloads

Manual of Procedure

... and to a shared member where all district personnel can access your account.

DISTRICT DUES AND INSURANCE PREMIUM (ON INVOICE) TO

District Treasurer: David Carruthers

Mobile: 0414 824 635

Email: david.carruthers@rotary9800.org

Direct credit to Westpac BSB 033181 Account No 375477

DISTRICT GOVERNOR

Michael Lapiña

Mobile: 0414 586 607

Email: michael.lapina@rotary9800.org

NETWORKER CONTRIBUTIONS

To District *Networker* Editor – networker@rotary9800.org

FOUNDATION DONATIONS/CONTRIBUTIONS

Club and Personal Giving details [click here](#)

PDG Grant Hocking

Mob: 0429 802 722

Email: granthocking64@gmail.com

INSURANCE CLAIMS AND QUERIES

Insurance Officers - Vicki Hale or Ian Wholohan
Email: insurance@rotary9800.org

ROTARY INTERNATIONAL SOUTH PACIFIC AND PHILIPPINES OFFICE

Address: 25/1 Maitland Place, Norwest. NSW. 2153
Phone: 02 8894 9800
Email: risppo@rotary.org
Contacts List: [download listing](#)

RDU MAGAZINE

Contributions, subscriptions and advertisements
Address: 25/1 Maitland Place, Norwest. NSW. 2153
Postal: PO Box 7044, Norwest. NSW. 2153

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Website: www.rotarydownunder.org
Facebook: facebook.com/rotarydownunder
Instagram: [@rotarydownunder](https://instagram.com/rotarydownunder)
Office hours: 9.00am-5.00pm Monday-Friday (except public holidays).
Manages all matters relating to the Regional Magazine.

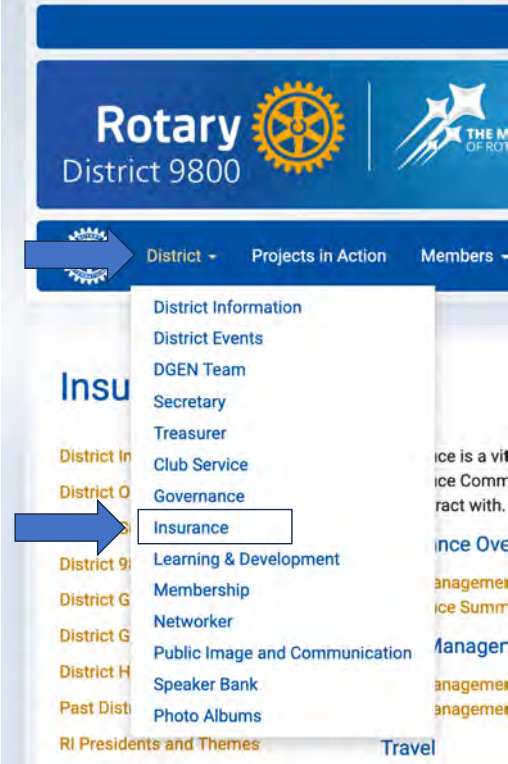
RDU SUPPLIES – Merchandise and Regalia

Licensed supplier of Rotary International emblem merchandise
Rotary Down Under, 25/1 Maitland Place, Norwest. NSW. 2153 Phone: 02 9633 4888
Sales/Orders: sales@rdusupplies.com.au
Website: www.rdusupplies.com.au
Visit the Supplies website for safe and secure ordering of Rotary branded merchandise.

RDU Group Representative: PDG Brian Peters. Phone: 0407 528 118 Email: brian.L.peters@gmail.com

our platform, and
we use and how.

Insurance Certificates
(Certificates of Currency)
can be downloaded at:



Looking forward to your year

**Documents that you should know where to find
or have copies of:**

- Club Constitution and Bylaws
- Club Certificate of Incorporation
- Insurance - Certificates of Currency
- Original Charter Certificate issued by RI
- District 9800 Club Administration Guidelines Manual
- RI Manual of Procedure
- RI Code of Policies

What should you be doing now if you haven't already done so

Register for My Rotary

www.rotary.org

Register for Rotary Down Under

www.rotarydownunder.com.au

Register for Rotary District 9800

www.rotarydistrict9800.org.au

Why My Rotary?

Why RDU

Why Rotary District?

- **Record membership**
- **History of membership**
- **Semi-Annual Dues**
- **Foundation contributions**
- **Enter club goals for Presidential citation**
- **Downloads**
- **... and much much more.**
- **Why RDU**
 - Update members
 - Bi-annual invoice
- **Why District**
 - enables you to maintain the database of members so that the online directory is up-to-date at all times.
 - Access to downloads, admin manual, insurance certificates, district policies, Constitution and Bylaws, protection policies, foundation grants forms etc.

What else?

Meet with your predecessor to ensure a smooth handover at the start of July.

- Things you need to organise with them
- To receive access to the complete records of the Club both statutory and historic and details of where items are stored.
- To arrange for change of passwords on computer systems/club computers plus websites and databases etc.
- Arrange for Board minute at the June Board meeting to allow update of bank account signatories.
- Access to mailbox and any other storage facilities.

The Club Calendar

In conjunction with other Club members set the dates for:

- Board Meetings
- Annual General Meeting
- Club Forums
- Record date of DG visit- no other speaker on that day
- Special events eg Club birthday, Club changeover

anything else

Prepare for effective Board meetings

- Liaise with your President and work out the best procedure for organising Board meetings
- Does your Club have set days and times for Board meetings – is this going to stay the same?
- How would your President like the Agenda done?
- Are there set templates for reports and requests from committees?

Actual logistics include

- Sending out a notice of meeting
- Confirm participation / apologies / quorum
- Documents and reports received and circulated in a timely manner

Board meeting

Ensure Minutes are taken either by you or a minute secretary.

- These should be written up as soon as possible after the meeting and include details of actions decided upon, by whom and by when.
- Ensure any recommendations for Board approval or expense payments within or outside of the original budget are recorded.
(this is a must for audit purposes)
- Some Clubs include information from the Board meeting in their Bulletin – a discussion with your President.
- File a complete set of reports including treasurer, committee reports and Board minutes. (The auditor will request this information when auditing the financial reports for the year)

These reports form part of your history and statutory archive

Statutory obligations of an Incorporated Body

An incorporated association is required to do amongst other things:

- Ensure that the registered name and number of the association appears in all notices, advertisements, publications and business documents
- Maintain adequate and accurate accounting records of its financial transactions
- Have accounts audited or reviewed at the end of each financial year as required under the current incorporated associations rules published on the Consumer Affairs Victoria (CAV) website and retain accounting records for 7 years
- Notify the Registrar of any changes to its statement of purpose or rules or change to Public Officer or address. Secretary is usually the Public Officer so the change may be annual.
- Make a copy of its rules available for inspection by its members on request
- Update authorised officer with ATO if your Treasurer changes if registered for GST

Cont...

Statutory obligations of an Incorporated Body

Each calendar year an incorporated association must:

- Present the Club's accounts to the Board for approval prior to the AGM.
- Hold an annual general meeting within 5 months after the end of the association's financial year. (By November 30).
- Notify members of the AGM date and agenda at least 14 days prior to the meeting or at least 21 days if a Special Resolution is proposed.
- Prepare an AGM agenda which includes the election of officers for the following Rotary year and approval of accounts from the prior Rotary year. *(Process for nominating candidates for office is in your Constitution)*
- Ensure minutes of the AGM are recorded, approved at the next AGM and filed.

...cont

Statutory obligations of an Incorporated Body

Financial statements and auditing requirements – incorporated associations

- The Club must lodge an annual statement with Consumer Affairs Victoria every year within one month after its annual general meeting.
- On or after the end of the financial year date, you will receive an email notification to lodge your annual statement.
- You will need to include a Schedule 1, Regulation 15, Form 1 to go with your accounts.
- All information about how to do this is found on the Consumer Affairs Victoria website:

<https://www.consumer.vic.gov.au/clubs-and-fundraising/incorporated-associations>

Payment of Semi-Annual dues

In conjunction with the President and Treasurer put in place a system to ensure that the club members reported on District and Rotary International are correct as at:

June 30

December 31

Semi annual dues are charged on 1st July and 1st January

If your numbers are incorrect, you will be charged, and have to pay dues, for the numbers reported in the databases.