



Welcome to Your Role Documents

Club Officers and Committee Chairs

April 15, 2022

Club Secretary

Club Treasurer

Foundation Chair

Membership Chair

Service Projects Chair

Public Relations Chair

Club Service Chair

Welcome to Your Role: Club Secretary

Welcome to your new role as Secretary for your club! As club secretary you play an important role in your club's ability to manage its affairs, carry out service projects, fundraise, and support The Rotary Foundation. Use this Training Guide to get ready to assume your new responsibilities. Follow the embedded links to key resources and tools. Save it for frequent use!

What you do

- Maintain minutes of club and board meetings
- Maintain membership data on ClubRunner, and ensure synchronization with MyRotary data
- Maintain the club's calendar of programs and activities
- Handle club correspondence
- Function as administrative assistant to president & board

Key Tasks

- Monthly: Take & distribute minutes
- Monthly: Post changes to the program/ activity calendar, and disseminate to membership
- Monthly: Update membership data in ClubRunner as members are added or terminated (especially before December 31 and June 30)
- Monthly: Prepare correspondence as required or directed
- May: Prepare next year's program/activity calendar for discussion and approval with president & board

How to prepare

- Take online courses for club secretary in the [Learning Center](#). We know your time is valuable. We suggest you spend less than an hour taking just these 3 courses between April and June:
 - [Getting Started with the Learning Center](#) (0:15)
 - [Get Ready Club Secretary](#) (0:15)
 - [Club Administration: Club Secretary](#) (0:15)
- Visit and familiarize yourself with the District 7210 Website; obtain a member log-in and browse the Member Area (aka district ClubRunner site)
- Attend district training assembly occurring annually in late April/ early May
- Interview predecessors and become familiar with records they kept

Valuable tools you need to learn how to use

- [Adding and removing members from ClubRunner.](#)
- [Synchronizing data between ClubRunner and MyRotary](#)

Rotary support you can call on

- Outgoing and past club secretaries
- Club president, president-elect, treasurer, and club membership committee chair
- Assistant governor for your region
- District-sponsored moderated discussions scheduled throughout the year, watch for emails

Additional resources to view when needed

- [Pay or view your club invoice](#) (Rotary International Dues and Fees)
- Set and track goals in [Rotary Club Central](#)

We hope this helps you begin your new role! Be sure to register for the [upcoming District Training Assembly](#) happening on May 7 at SUNY New Paltz, 8:30 am to 2:00 pm!

- Michael Polasek, District Governor
- Larry Palant, District Governor-Elect
- Peter Sullivan, District Governor-Nominee

Distribution:

- Next Year: Club Secretaries
- Cc via separate email: Club Presidents, President-Elects, Club Secretaries, District Leadership

Welcome to Your Role: Club Treasurer

Welcome to your new role as Treasurer for your club! As club treasurer you play an important role in your club's ability to carry out service projects, fundraise, and support The Rotary Foundation. Use this Training Guide to get ready to assume your new responsibilities. Follow the embedded links to key resources and tools. Save it for frequent use!

What you do

- Manage club funds
- Collect and submit dues and fees
- Report on the state of your club's finances (e.g., quarterly in January, April, July and October)
- Work with The Rotary Foundation
- Pay Club Invoices received from Rotary International, and District 7210
- Prepare the budget
- File IRS Form 990 annually

Key Tasks

- Monthly: Reconcile bank statements and prepare a financial report for the President & Board
- Semi-Annual or quarterly: Create and send club dues bills to members
- May: Prepare next years budget for discussion and approval with President & Board
- July: Update bank account signature cards upon change in Officers
- July and January: Pay Rotary International dues. Your RI 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.
- August/September: Pay District club invoice upon receipt
- August/September: Prepare or work with outside professional on IRS 990 due 11/15

How to prepare

- Take online courses for club treasurer in the [Learning Center](#). We know your time is valuable. We suggest you spend less than an hour taking just these 3 courses between April and June:
 - [Getting Started with the Learning Center](#) (0:15)
 - [Get Ready Club Treasurer](#) (0:15)
 - [Managing Club Finances: Club Treasurer](#) (0:15)
- Visit and familiarize yourself with the District 7210 Website; obtain a member log-in and browse the Member Area (aka district ClubRunner site)
- Attend district training assembly occurring this year on May 7 at SUNY New Paltz.
- Interview predecessors and become familiar with records they kept

Valuable tools you need to learn how to use

- [Pay or view your club invoice](#) (Rotary International dues and fees)
- [Update your club membership data](#)
- Your club's accounting software package (e.g., QuickBooks, ClubRunner)

Rotary support you can call on

- Outgoing and past club treasurers
- Club president, president-elect, secretary and club foundation committee chair
- Assistant governor and District Rotary Foundation Coordinator
- District-sponsored moderated discussions scheduled throughout the year, watch for emails

Additional resources to view when needed

- Guide To The Rotary Foundation <https://rcc.rotary.org/#/dashboard>
- Set and track goals in [Rotary Club Central](#)

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- Michael Polasek, District Governor
- Larry Palant, District Governor-Elect
- Peter Sullivan, District Governor-Nominee

Distribution:

- Next Year: Club Treasurers
- Cc via separate email: Club Presidents, President-Elects, Club Secretaries, District Leadership

Welcome to Your Role: Club Foundation Chair

Welcome to your role as Chair of the Rotary Foundation Committee for your Club! As Chair you play an important role in your Club's ability to obtain Rotary grant funding (*FREE MONEY!*) for your Club's service projects, inspire your Club & members to generously donate to The Rotary Foundation, and encourage your Club & members to achieve the many levels of Rotary Recognition Awards. Use this Guide as a summary of your responsibilities. Follow the embedded links to key resources and tools. Save it for future reference!

What you do

- **GRANTS:** Coordinate with your Club's Service Chair to identify grant funding opportunities.
 - Ensure that your Club has many impactful hands-on local & international service projects.
 - Achieve the requirements & deadlines for applying for & receiving District & Global Grants.
 - Coordinate with your Club's Membership & Public Awareness committee to ensure that your Club's service successes are shared with your members, community and beyond!
- **GIVING:** Inspire your Club & members to generously donate to The Rotary Foundation's Annual Fund-SHARE and other TRF funds.
 - Coordinate with your Club Board to set Club & individual Giving Goals to achieve the District Goals, including TRF donations in July, December, March & June of each year.
 - Consider a \$25+/member donation to TRF as an option on your Club members' dues invoice.
- **RECOGNITION:** Encourage your Club & members to achieve Rotary recognition awards.
 - Promote TRF Giving & Recognition with quarterly awareness presentations highlighting Club members' achievement of Rotary Direct, EREY, Sustaining Member, Paul Harris Fellows, PHF Society, Major Donors, etc., and Club achievement of EREY Banner, 100% PHF Banner, etc.

Key milestones

- **March-May:** Collaborate with your Club Foundation Committee & Club Board to ensure success on current year Club Grants, Giving Goals & Recognition Awards as well as to set Goals for the upcoming year's Grants, Giving & Awards.
 - Upcoming Year District Grant Applications typically due Mid-May.
 - Current Year District Grant Progress Report typically due May 1, Final Report due NLT June 15.
 - Achieve District Foundation Giving/Recognition Goals ASAP, preferably no later than June 15.
 - Annual Global Grant Proposals typically due in October/November. Verify deadline w/DRFC.
- **Monthly:** Meet and report to the Club Board the status of Grants, Giving Goals & Recognition awards.
- **Quarterly:** Club presentation on the status of Club Grants, Giving Goals & Recognition awards.

How to prepare

- Take online courses in the [Learning Center](#) (*sign-in to MyRotary.org first!*). We suggest that you take these four [90](#) courses at your convenience before June 1:
 - Getting Started with the Learning Center (15m)
 - Get Ready: Club Rotary Foundation Committee (15m)
 - Managing Your Foundation Activities: Club Rotary Foundation Committee (15m)
 - Rotary Foundation Basics (45m)
- Familiarize yourself with the [District 7210 Website](#), especially the [Foundation page](#) & Resources.
- Attend the District Assembly occurring annually in late April or early May.

Valuable tools that you need to learn how to access & use

- [The Rotary Foundation website](#) and our seven [Areas of Focus](#).
- Foundation Reports and Resources on the MyRotary.org [Rotary Club Central](#) page.
- [Club Giving Reports](#) & Forms on the MyRotary.org [Club Administration](#) and [Donate](#) pages.

Rotary support that you can call upon



- Outgoing and past Club Foundation Chairs
- Club President, President-elect, Secretary, Treasurer and Club Service Committee Chair
- Assistant Governor and District Rotary Foundation Chair
- District-sponsored discussions/presentations scheduled throughout the year, watch for emails

Additional resources to view when needed

- [The Rotary Foundation Reference Guide](#) download.
- MyRotary.org [Apply for Grants](#), [Donor Recognition](#) and [Rotary Grant Center](#) pages.

We hope this helps you begin your new role! Be sure to register for the [upcoming District Training Assembly](#) happening on May 7 at SUNY New Paltz, 8:30 am to 2:00 pm!

- Michael Polasek, District Governor
- Larry Palant, District Governor-Elect
- Peter Sullivan, District Governor-Nominee

Distribution:

- Next Year: Club Rotary Foundation Chair
- Cc via separate email: Club Presidents, President-Elects, Club Secretaries, District Leadership



Welcome to Your Role: Membership Chair

Welcome to your role as Chair of the Membership Committee for your Club! As Chair you play an important role in the growth for your club, suggesting member attraction and engagement events, coordinating the onboarding process, and generally being the membership “cheerleader” Below are RI links with key resources and tools to assist you.

What you do

- **Assemble a Club Membership Attraction and Engagement Committee:**
Depending upon the size of the club, 3-4 members is ideal. Schedule regular meetings and set new member goals each year by June 30
 - Enter the Membership Goals in My Rotary
 - Hold a Club Assembly to discuss the Membership goals
- **Hold New Member Attraction Events:**
 - Visitor Days, Business Card exchanges, Organizations you fund
- **Promote Member Engagement Events:**
 - Create a Fun Committee in the club, and schedule social events
 - Check on members who have not been at meetings
 - Create a signup list for projects and fund raisers. Consider assigning members.
 - Survey club members with Rotary Club Health check, custom Google Survey
- **Attend District Membership meetings, District Assembly and Conference**

Key milestones

- January- Hold Member Attraction Day, April- Set Membership Goals
- August – Hold Member Attraction Day
- Monthly: Report to the Club Board and membership
- Quarterly: Hold Membership Attraction and Engagement Committee meetings

How to prepare

- Take **Club Membership Committee courses** in the [RI Learning Center](#) by June 1
 - [Getting Started with the Learning Center](#) (15 min.)
 - [Get Ready Club Membership Committee](#) (15 min.)
 - [Develop Membership Strategies: Club Membership Committee](#) (15 min.)
- Familiarize yourself with the [District 7210 Website](#), especially the [Membership](#) page
- Attend the District Assembly occurring annually in late April or early May
- Take additional courses as you begin your year:
 - [Strategies for Attracting New Members](#)
 - [Strategies for Engaging Club Members](#)

Valuable tools that you need to learn how to access & use

- [Engaging Younger Professionals](#)
- Access [membership reports for your club via MyRotary](#)
- District Membership Committee
- Assistant Governor

Rotary support that you can call upon

- Outgoing and past Club Membership Chairs

Additional resources to view when needed

- Tools and materials available on the MyRotary [Membership page](#)

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- Michael Polasek, District Governor
- Larry Palant, District Governor-Elect
- Peter Sullivan, District Governor-Nominee

Distribution:

- Next Year: Club Membership Chair
- Cc via separate email: Club Presidents, President-Elects, Club Secretaries, District Leadership



Welcome to Your Role: Club Service Projects Chair

Welcome to your new role as Chair of the Service Projects Committee for your club! As chair you play an important role in your club's ability to plan and carry out successful service projects, fundraise, and support The Rotary Foundation. Use this Training Guide to get ready to assume your new responsibilities. Follow the embedded links to key resources and tools. Save it for frequent use!

What you do

- Assess community needs
- Set service goals and yearly project calendars
- Help identify project managers and assist them in acquiring project resources
- Implement service projects
- Promote and evaluate completed projects

Key Tasks

- Monthly: Assist with acquiring project resources and implementing projects
- February/March: Conduct a Community Assessment of needs vs. usual club project activities
- May: Provide service project schedule for inclusion in PE's program/activity calendar for next year
- June/July: Recruit individual project chairs for next year scheduled projects

How to prepare

- Take online courses in the [Learning Center](#). We know your time is valuable. We suggest you spend less than an hour taking just these 3 courses between April and June:
 - [Getting Started with the Learning Center](#) (0:15)
 - [Get Ready: Service Projects Committee](#) (0:15)
 - [Planning your Projects: Service Project Committee](#) (0:15)
- Visit and familiarize yourself with the [District 7210 Website](#), especially the [Service tab](#)
- Attend the district training assembly occurring annually in late April/ early May

Valuable tools you need to learn how to use

- Locating [Projects information for your club on Club Central](#)

Rotary support you can call on

- Outgoing and past club service chairs
- Club president, president-elect, secretary and club foundation committee chair



- Assistant governor and District Service Committee Chair
- District-sponsored moderated discussions scheduled throughout the year, watch for emails

Additional resources to view when needed

- Guide To The Rotary Foundation
- Review the [Project Lifecycle Resources](#) available on MyRotary

We hope this helps you begin your new role! Be sure to register for the [upcoming District Training Assembly](#) happening on May 7 at SUNY New Paltz, 8:30 am to 2:00 pm!

- Michael Polasek, District Governor
- Larry Palant, District Governor-Elect
- Peter Sullivan, District Governor-Nominee

Distribution:

- Next Year: Club Service Projects Chair, Club Community Service Chair
- Cc via separate email: Club Presidents, President-Elects, Club Secretaries, District Leadership



Welcome to Your Role: Club Public Relations Chair

Welcome to your new role as Chair of the Public Relations Committee for your club! As chair you play an important role in your club's ability to promote and celebrate your meetings and club events. You help raise the visibility of the whole Club, thereby enhancing recruitment efforts, fundraising and community appreciation for club efforts. Use this Training Guide to get ready to assume your new responsibilities. Follow the embedded links to key resources and tools. Save it for frequent use!

What you do

- Know your local media
- Write press releases
- Promote RI and club activities through your club's website and on Social Media
- Ensure club signs, brochures and apparel reflect current Rotary branding standards

Key Tasks

- Monthly: Promote club activities and projects to members, local media outlets & the local community
- Monthly: Use social media to raise awareness of Rotary and your club in the community
- May/June: Develop a public image plan for the next year coordinating with the President-Elect
- June: Select committee members and organize them into local media advertising, social media, and special events subcommittees; orient the sub-committees
- August & February: Subcommittees should meet at least twice to plan activities

How to prepare

- Take online courses in the [Learning Center](#). We know your time is valuable. We suggest you spend less than an hour taking just these 3 courses between April and June:
 - [Getting Started with the Learning Center](#) (0:15)
 - [Get Ready: Public Image Committee](#) (0:15)
 - [Promoting Your Club as People of Action](#) (0:15)
- Visit and familiarize yourself with the [District 7210 Website](#)
- Attend the district training assembly occurring annually in late April/ early May

Valuable tools you need to learn how to use

- Locating [Projects information for your club on Club Central](#)

Rotary support you can call on

- Outgoing and past club public relations chairs



- Club president, president-elect, secretary and club foundation committee chair
- Assistant governor and District Public Image Committee Chair
- District-sponsored moderated discussions scheduled throughout the year, watch for emails

Additional resources to view when needed

- View the [Public Relations](#) page on MyRotary

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- Michael Polasek, District Governor
- Larry Palant, District Governor-Elect
- Peter Sullivan, District Governor-Nominee

Distribution:

- Next Year: Club Public Relations Chair
- Cc via separate email: Club Presidents, President-Elects, Club Secretaries, District Leadership

Welcome to Your Role: Club Service Chair

Welcome to your new role as Chair of the Club Service Committee for your club! As chair you play an important role in your club's ability to keep members engaged and to make meetings and club activities informative and fun! Use this Training Guide to get ready to assume your new responsibilities. Follow the embedded links to key resources and tools. Save it for frequent use!

What you do

- Assess social opportunities and interests of club members
- Set social events and speaker dates for club program/activity calendar
- Oversee production of monthly club newsletter for members
- Act as liaison to club speakers, show club's appreciation
- Organize club social events and activities

Key Tasks

- Monthly: Produce club newsletter highlighting recent and upcoming club activities, member birthdays, anniversaries, etc.
- Monthly: Liaise with scheduled speakers and show club's appreciation
- Quarterly: Arrange for speakers for next few months
- May: Provide social events and speaker dates for inclusion in PE's program/activity calendar for next year
- June/July: Recruit members for next year committee, hold organizational meeting

How to prepare

- Take online courses in the [Learning Center](#). We know your time is valuable. We suggest you spend less than an hour taking just these 3 courses between April and June:
 - [Getting Started with the Learning Center](#) (0:15)
 - [Get Ready: Service Projects Committee](#) (0:15)
 - [Planning your Projects: Service Project Committee](#) (0:15)
- Visit and familiarize yourself with the [District 7210 Website](#),
- Attend the district training assembly occurring annually in late April/ early May

Valuable tools you need to learn how to use

- Locating [Projects information for your club on Club Central](#)

Rotary support you can call on

- Outgoing and past club service chairs
- Club president, president-elect, secretary and club membership committee chair
- Assistant governor
- District-sponsored moderated discussions scheduled throughout the year, watch for emails

We hope this helps you begin your new role! Be sure to register for the [upcoming District Training Assembly](#) happening on May 7 at SUNY New Paltz, 8:30 am to 2:00 pm!

- Michael Polasek, District Governor
- Larry Palant, District Governor-Elect
- Peter Sullivan, District Governor-Nominee

Distribution:

- Next Year: Club Service Chair
- Cc via separate email: Club Presidents, President-Elects, Club Secretaries, District Leadership