

ROTARY DISTRICT 5790 ASSEMBLY

SECRETARY TRAINING

April 16, 2016

Moderator: Margaret Griffin (Denton Noon)

District Secretary 2016-2017

grif71@verizon.net

Club Secretaries: Craig Martin (Metroport)

craigmartin77@gmail.com

Marilyn Pokorny (Lewisville Morning)

jmpokorny50@gmail.com

Kathryn Rotter (Mid Cities Pacesetters)

klrotter@tarrantcounty.com

District Secretary: Mike Pope (Denton Noon)

mpope@firstunitedbank.com

Most Important Things a Club Secretary Needs to Know

Roles and Responsibilities, Attendance, Deleting and Adding Members, Make-ups

Mike:

1. Get with your club president long before he/she becomes president, while he/she is President-elect, and gain an understanding of the duties the president would like for you to handle. These may be the same or different from past club secretaries or your club or other clubs.

2. If your club has an executive secretary, learn the different roles of each position and ask both your club president and executive secretary a lot of questions so nothing falls through the cracks.

3. Work with your club's membership committee

Kathryn:

1. Know the name and contact number of the District Secretary. (They should also try and meet this person.)

2. Know the date your attendance must be submitted by.

3. Use a laptop or tablet/iPad to take your attendance at each meeting. Saves a lot of time.

4. If your club doesn't have club runner be sure to know how and where you can log in to this information on the District website.

5. Be sure to communicate to your members what counts as a make-up for a missed meeting and how they will need to report this make-up to you

Craig:

1. Understand the importance of working with club leaders.
2. Know how to enter member attendance and close out monthly reporting.
3. Know how to change and establish membership.

Marilyn:

1. Enter attendance weekly. Don't wait until the end of the month to enter all four weeks. It will only take you maybe 15 minutes weekly otherwise it becomes a chore and will take probably an hour.
2. Be familiar with how to delete and add a new member. Print out the sheet that shows you how and keep it in your notebook or by your attendance stuff.
3. Know the policy of your club. Know how to add a make-up for the club or for just one person. Periodically remind the membership that they have to tell you when they have made a make-up. Otherwise they will not get credit. Bottom line-you need the date and event on a piece of paper or email. Verbal is not a good idea because you will forget.

What Else Do Secretaries Do?

Marilyn:

1. Write thank you notes to the speaker or guest attending or both.
2. Order pins or speaker gifts per request from the President for guest speakers or new Rotarians.
3. Get awards for Student of the Month—print them and take them for framing.
4. Order awards for “Pass the Gavel” event to induct new President.
5. Make up name badges for new Rotarians or a new Blue Badge Rotarian.
6. Order envelopes and business cards as needed.
7. Invite Mayor, City Council, or others to special events.
8. Take notes at Board Meetings and send them out to the Board.
9. Make phone calls.

Appendices

Page 6: How to Create a My Rotary Account

How to Add a Member

<http://clubrunner.helpserve.com/Knowledgebase/Article/View/269/164/how-to-add-a-new-member>

How to Delete a Member

<http://clubrunner.helpserve.com/Knowledgebase/Article/View/69/164/how-to-delete-a-member>

Lead Your Club: Secretary, 2016-2019 Edition, Rotary International
Go to shop.rotary.org then enter Secretary. Cost for manual is \$3.00 each.
You can also download this manual.

Page 7: Your Job as Club Secretary

Page 8: Member Data Form

Page 9: Thank you notes from Lewisville Morning Rotary Club

Page 10: Visiting Rotarian Card from Rotary

Visiting Rotarian Card made for Metroport Rotary Club as an alternative

Page 11: Lewisville Morning Rotary Club New Member Personal Information

Page 12: Lewisville Morning Rotary Club Guest Speaker Profile

Page 13: Mid-Cities Pacesetters Rotary Club Meeting Make-Up Sheet

How to Create a My Rotary Account

7 Steps

- 1. Go to www.Rotary.org**
- 2. Click on Sign In/Register**
- 3. Click on Create Account as a first-time user**
- 4. Fill in the Account Registration Information and
click on Continue**
- 5. You will be informed that an email has been sent to you**
- 6. Check you email for the address you provided in the
step above

Click on the blue link (activate your account) to finalize
the process**
- 7. Fill in the mandatory information and click on
Create Account**
- 8. Click on Continue**
- 9. You have created a My Rotary account**

YOUR JOB AS CLUB SECRETARY


As club secretary you help your club run well. Watch its trends to identify what works well and what doesn't, and share this information with club and district leaders. (Find detailed information in [Lead Your Club: Secretary](#))

RESPONSIBILITIES

1. Attend the district training assembly and the district conference
2. Meet with the outgoing secretary and receive club records
3. Meet with the incoming board of directors
4. Create a My Rotary account on Rotary.org if you don't already have one
5. Update your club's records and member list on My Rotary as changes occur
6. Give the club treasurer the club invoices, due in January and July
7. Serve on the club board and club administration committee
8. Take minutes at club and board meetings and club assemblies
9. Update club and officer information for the Official Director and Rotary records
10. Manage club correspondence, responding to email and sending official notices and invitations
11. Keep promotional items, name badges, and other materials used at meetings and events
12. Take attendance and submit monthly attendance report to the district governor
13. Preserve your club's historical records
14. Write an annual report at the end of the Rotary year
15. Assist the club president, treasurer, and committees as needed
16. Meet with your successor and hand over club records

APPENDIX 6

MEMBER DATA FORM

Rotary  BY-112

MEMBER DATA FORM

If you have access to the Internet, membership changes can be reported through www.rotary.org/membership instead of using this form. This form can be used to report new or terminating members or membership information changes to RI. Use a separate form for each member. Please report the name as it appears in Latin alphabet in the individual's passport or other government-issued document. This form can be downloaded and completed electronically at www.rotary.org. Send one copy to your district governor, keep a copy for your club files, and send the original form to:

ROTARY INTERNATIONAL, 1560 Sherman Avenue, Evanston, IL 60201-3698, USA Fax: +1-847-733-9340 Email: gcra@rotary.org

Rotary Club of _____ District _____

STATE/PROVINCE _____ COUNTRY _____

Member Name: FIRST _____ MIDDLE INITIAL _____ LAST _____

Rotary Member ID#* _____
*Only for resigning and transferring members. All new members will be provided with ID# by RI.

Mailing Address: NUMBER AND STREET _____ CITY _____
 STATE/PROVINCE _____ COUNTRY _____ POSTAL CODE _____

EMAIL _____

☐ **ADD MEMBER** **DATE OF ADMISSION** _____
☐ Male ☐ Female Date of Birth _____ MM/DD/YY
*Transferring Member? If yes, provide Member ID# above. ☐ Active Member ☐ Honorary Member
☐ Past RI Director ☐ Past District Governor

Former Rotary Club of _____ District _____

STATE/PROVINCE _____ COUNTRY _____

Language Skills: _____ New Member Sponsored by _____

Subscription: ☐ The Rotarian ☐ Rotary regional magazine Sponsor's Member ID# (if known): _____

☐ **MEMBER INFORMATION** **DATE OF CHANGE** _____
☐ **Change of Address** MM/DD/YY
 Old Mailing Address: _____
 NUMBER AND STREET _____ CITY _____
 STATE/PROVINCE _____ COUNTRY _____
 POSTAL CODE _____
 New Mailing Address: _____
 NUMBER AND STREET _____ CITY _____
 STATE/PROVINCE _____ COUNTRY _____
 POSTAL CODE _____

☐ **Change of Email** _____
 FORMER EMAIL _____
 NEW EMAIL _____

☐ **Change of Name** _____
 FORMER NAME _____
 NEW NAME _____

☐ **Change Membership Type to** ☐ Active ☐ Honorary

☐ **TERMINATE MEMBER** **DATE OF TERMINATION** _____
 Reason for Termination (check one) MM/DD/YY
☐ Attendance (1) ☐ Business Obligations (2) ☐ Deceased (3) ☐ Family Obligations (4)
☐ Health / Personal (5) ☐ Joining New Club (6) ☐ Relocation** (7) ☐ Other (8) Please specify _____

** If reason for termination is Relocation, please use the Membership Referral form at www.rotary.org/membershipreferral

CLUB SECRETARY (PRINT NAME) _____ SIGNATURE _____ DATE (MM/DD/YY) _____



Thank you for your presentation.

We look forward in seeing you again at one of our meetings. You are most welcomed any time. Have you thought about becoming a Rotarian?

In the service of Rotary,

John Pokorny - President



Thank you for sharing your morning with us.

We look forward in seeing you again at one of our meetings. You are most welcomed any time. Have you thought about becoming a Rotarian?

In the service of Rotary,

John Pokorny - President

VISITING ROTARIAN



PRINT NAME IN LARGE LETTERS _____

HOME CLUB _____

YOUR CLASSIFICATION _____

Please check office held in your club, if any

PRESIDENT ☐
 VICE-PRESIDENT ☐
 SECRETARY ☐
 TREASURER ☐
 DIRECTOR ☐

REMOVE THIS COPY - GIVE TO GREETER

Please give this Rotarian attendance credit for meeting of _____

DATE _____

SECRETARY _____

ROTARY CLUB OF

DIRECTIONS: use in **POCKET** or as **STICK-ON**

1. Give second copy to Greeter.
2. Insert card in pocket with name portion hanging over front of pocket.
3. If no pocket, remove postcard at perforation, peel off adhesive backing, apply tag.

NOTE: Adhesive not recommended for silk/leather/suede

Item No. R89708 Russell-Hampton Co.



METROPORT
 ROTARY CLUB

Club 25472 District 5790

Visiting Rotarian

Name: _____

Home Club: _____

Attended the meeting of Metroport Rotary Club on:

Date: ____ / ____ / ____ Secretary: _____

LEWISVILLE MORNING ROTARY CLUB

NEW MEMBER PERSONAL INFORMATION

First Name _____ Mid. Initial _____ Last Name _____
 Nickname (if preferred) _____ Birthday (month and day only) _____
 Spouse's Name _____ Birthday (month and day only) _____
 Children's Name(s) & Age(s) _____
 Home Address _____ City _____ Zip _____
 Home Phone (____) _____ Fax (____) _____ Mobile (____) _____
 E-Mail _____
 Home Town _____
 Education/School(s)/Degree(s) _____
 Veteran Yes / No _____ Branch of Service _____ Rank _____
 Business/Company/Profession _____
 Business Address _____ City _____ Zip _____
 Business Phone (____) _____ Fax (____) _____ E-Mail _____
 Previous Rotary Affiliation (club name) _____ City _____ Dates: _____
 Offices Held (if any) _____
 Hobbies _____
 Professional/Technical/Hobby skills that can benefit our club's activities _____

 Rotary Sponsor _____

Golf Shirt Size (circle one) sm med lrg x-lrg xx-lrg xxx-lrg other _____

I understand and agree that the Lewisville Morning Rotary Club Membership Directory and Telephone List is printed for the convenience and benefit of the membership and is not to be distributed to anyone outside the Club nor is confidential information to be disseminated to anyone outside the membership.

Signed _____ Date _____

4/23/03

LEWISVILLE MORNING ROTARY CLUB**GUEST SPEAKER PROFILE**

(TO BE FILLED OUT BY THE SPEAKER HOST)

Rotary Host Name: _____

Date of presentation: ____/____/____

(Please fill in as completely as possible as the information will be used when we send a thank you to the speaker)

Full name of speaker: _____

USPS address:

street: _____ City: _____ State: _____

& zip code _____ E-mail: _____

Bio. Information for introduction:

Background: _____

Vocation: _____ :Location _____

Education: _____

Family: _____

Other: _____

Subject of presentation: _____

Please note the speakers needs for audio / visual or other support ie: table, space etc:

Give this form to club Secretary at the end of the meeting.



ROTARY MEETING MAKE-UP SHEET

Make up meeting examples: e-club, Attend another Rotary Club Meeting, Rotary Social Event, Rotary Volunteer Event, Interact Club Meetings, Your Club Board Meeting, Village Library, Meals on Wheels, Fellowship Breakfast, Fireside Chat, Rotary District Meetings/Conferences etc...

Make up will need to take place 14 days before or after the meeting date you miss or plan on missing.

Name	Missed Meeting Date	Make-up Date	Make-Up Event: