

DISTRICT 9910 CLUB LEADERS' SEMINAR

CLUB SECRETARY'S ROLE 2017/18.

<https://www.rotary.org/myrotary/en/learning-reference/learn-role/secretary>

The tasks below are those generally undertaken by the Secretary, however this may vary between clubs. Overall responsibility for ensuring good administration and the achievement of deadlines rests with the Club President.

1. Three Main Databases

- Rotary International: My Rotary & Rotary Club Central online
<https://www.rotary.org/myrotary/>
- Club Level: This may be held in either Excel spreadsheets, Word documents, websites, Cloud systems (such as Google docs) or online in ClubRunner
- Rotary Down Under: Subscription management
www.rotarydownunder.com.au

2. Key Dates

- 1st July 1st Rotary International dues invoice
- 1st July Advise new club officers to Rotary Down Under
enquiries@rotarydownunder.com.au
- July District dues invoice (date may vary)
- 24th October World Polio Day
- October District training levy invoice (date may vary)
- October / November President-Elect training #1 (PETS1)
- December Invoice from Rotary Down Under for magazine (Jan-June)
- 31st December Club Annual General Meeting must be held **before** this date
- 1st January 2nd Rotary International invoice
- 1st February Ensure all **incoming** club officers are entered in My Rotary
- 23rd February Rotary's birthday
- March President-Elect training #2 (SPPETS)
- April / May Club Leaders' Seminar (aka District Training Assembly)
- April / May District Conference
- June Invoice from Rotary Down Under for magazine (July-Dec)

3. Admin & Logistics

- Maintain club member information in My Rotary
 - Add new members, change membership status, terminate members, amend information **as it happens** in My Rotary/Manage/Club Administration
- Update club member information in Rotary Down Under magazine database
 - Check members wanting Rotary Down Under magazine are on the database, check and update member details, remove terminated members
- Advise Rotary International of members wanting The Rotarian magazine via email to datacorrections@rotary.org
 - Provide member name and RI ID#, club name and RI ID#, member's postal address

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Admin & Logistics cont....

- Assist with New Member information / materials
- Mail & Correspondence (e.g Leave of Absence, respond to donation requests etc)
- Board Meetings – agenda and minutes
- Annual General Meeting – agenda and minutes and file accounts if club is a registered charity (www.societies.govt.nz/cms/banner_template/SOCUPLDFS)
- Club Constitution, Bylaws and other Legal Requirements
- RI and District publications / messages – circulate to members
- Club banners
- Paul Harris Fellow recognitions - complete application forms as required and hold recognition materials for presentation

4. Liaise with the President on.....

- Support and advice
- Provide club / member information as required
- Provide documentation as required

5. Liaise with the Treasurer on.....

- Maintain the Club's cheque signatories as required.
- Secretary consumables
- Provide apologies for meal refunds (if your club operates that system)
- Accompanying correspondence for payments
- Required information for Foundation payments (Annual Giving & Polio)

6. Liaise with the Bulletin Editor / Sergeant / Almoner on.....

- Advise of members on Leave of Absence
- Members' / Partners' birthdays, anniversaries, inductions
- Circulate other clubs' bulletins received
- Share appropriate attendance information

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7. Sources of Information/Assistance

Online - Websites	Rotary International www.rotary.org My Rotary www.rotary.org/myrotary Rotary Club Central My Rotary / Manage / Club & District Administration Rotary NZ website www.rotaryoceania.zone D9910 website www.rotarydistrict9910.org Own club website search by name Other club websites search by name Other Rotary organisations search by name (for example: End Polio Now or ShelterBox)
Online - Facebook	District 9910 Page www.facebook.com/RotaryDistrict9910 D9910 Rotarians Group www.facebook.com/groups/RotaryDistrict9910 Rotary NZ www.facebook.com/rotarynz/?fref=ts Rotary International www.facebook.com/rotary/?fref=ts Own club Page search by name Other club Pages search by name Other Rotary organisations search by name (for example: End Polio Now or ShelterBox)
People	Assistant Governor Fellow Rotarians District Chairs District Administrator
Magazines/bulletins	Rotary Down Under (also available online) The Rotarian Governor's Newsletter (also available online on District website) Club bulletin Other club bulletins District Directory (also available online on District website)
Other	Club Leaders' Seminar (aka District Training Assembly) President-Elect Training Rotary Learning & Information courses District Foundation seminars District Membership seminars Emails from District Administrator Rotary Support Office risspo@rotary.org

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Rotary Administration Training notes (CLUB)

My Rotary Profile

My Rotary account can only be created against an email recorded in RI against your record

The primary email address is the email used for correspondence/contact by RI.
The primary email address can be the same as the My Rotary log in, or it can be different.
Update the Skills/Interest area – part of 2016-17 Presidential Citation
Add Rotary Programs – this is what we want Rotary Alumni to do

Club Officers

Five roles which can add, edit or remove members / update club data / access club reports.

- President
- Secretary
- Treasurer
- Foundation
- Membership

These can be added as soon as they are elected/confirmed in their role – after AGM.

Only a **current** officer can add them

At midnight 30 June (EST) current access ends (16:00 on 1 July in NZ)

If you don't have Incoming Officers entered no-one will be able to get in.

Membership

This is what a club membership list looks like

“Membership” button gives a printout of members and contact details

“CRS” take you to Club Recognition Reports

Club Data | Reports | **Membership** | CRS

Rotary Club of: Westhaven
Club Number: 31108

Active and Honorary Members 16 record(s) [Add Members](#) [Terminated Members](#) [Deceased Members](#)

The following are active and honorary members

	Membership ID	Last Name	First Name	Admitted	Member Type
View Edit Terminate	5331782	Beattie	David	19-Dec-2000	Member
View Edit Terminate	6624131	Billington	David	27-Jan-2009	Member
View Edit Terminate	5902260	Burgoyne	Sheryl	29-Jun-2010	Member

Add new members either the day before induction or as soon as inducted.

If previous Rotarian – search for them

If satellite member – provide details to data@rotary.org.

When a satellite club is officially organised, Data makes sure that the members are added in the database with two separate entries, one as the sponsor club member and another as a satellite club member.

Honorary status removes person from Active list and District numbers

Rotary Down Under magazine

Email enquiries@rotarydownunder.com.au to obtain RDU ID number and password

Samantha Ausburn

Club Relationship Manager

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Tel: Direct 61.2.8833.8315

Enter officers for current year and incoming officers

Only members subscribing to Rotary Down Under need to be added to RDU database. Members subscribing to The Rotarian need to be advised to RI

To log in:

1. Go to www.rotarydownunder.com.au
2. Click on Subscription Management Login on right hand side of our home page
Or go directly to <https://database.rotarydownunder.com.au/login.php>
3. Enter your RDU ID number: **xxxxxx** and password: **xxxxxxxx** (you can change this if you wish once you have logged in - your password must be a minimum of eight characters (including at least one capital and one numeral))

Each club official (Pres, Sec, Treas or Database manager) is given access for one year at a time, however, you can add people for the next year. Just click on the update club details tab, then click the club positions tab – this is where you can add club officials to have access for next year.

Rotarian magazine

Send email to atacorrections@rotary.org

- Advising name,
- RI ID#,
- Club,
- Club RI ID#,
- Member's postal address

Paul Harris Transfer Recognition Transfer Request Form

Get these in well before the end of the Rotary year.

Right now (7 May) – Support Office is processing 65 PHF applications per day.

Manage / Club & District Administration / Reports / Club Reports / Contributions & Recognitions / Club Recognition Summary

In Reports – use Quick Links to “bookmark” reports you use frequently

Rotary Club Central

All members can access to view these

Club Officers can edit

News & Media / Presidential Citation / View Club Report – progress against goals

District Website

- Club Directory
- District Events
- “For Rotarians”

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President-Elect & President & District Key Dates 2017-2018

MONTH	PE & PRESIDENT TASKS	DISTRICT EVENT
July	<ul style="list-style-type: none"> • Create My Rotary account • Identify resources to support your year • Rotary International dues • First official board meeting – confirm club goals, budget and plans. • Plan for key events • Ensure club goals entered into Rotary Club Central by 1 July for your year • Club Changeovers • Support President-Elect 	<ul style="list-style-type: none"> • Rotary International dues • District Governor visits • NorthTec (Whangarei)
August Membership & Extension	<ul style="list-style-type: none"> • Understand your club, your members, start to identify your leadership team, including your successor 	<ul style="list-style-type: none"> • Rotary Learning & Information (WHG) • District Governor visits • District Management Meeting
September Basic Education & Literacy	<ul style="list-style-type: none"> • Understand your club, your members, start to identify your leadership team • District Grants applications close (30th) 	<ul style="list-style-type: none"> • District Governor visits • National Science & Technology Forum applications close • Stroke Foundation Day • District Grants applications close (30th) • Governor-Elect training & Institute (Auckland)
October Economic & Community Development	<ul style="list-style-type: none"> • Understand your club, your members, start to identify your leadership team • Advise Assistant Governor of PE for PETS1 training 	<ul style="list-style-type: none"> • District Governor visits • Youth Exchange Orientation weekend • World Polio Day (24th) • Rotary Reconnect Week (Alumni)
November Rotary Foundation	<ul style="list-style-type: none"> • President-Elect Training (PETS1) • Register for South Pacific President-Elect Training (SPETS) • Follow up on Rotary Foundation payments 	<ul style="list-style-type: none"> • District Governor visits • District Management Meeting • Rotary Learning & Information (AKL) • Centurion invoices • Youth Exchange South Island trip • Red Nose Day • World Interact Week
December Disease Prevention & Treatment	<ul style="list-style-type: none"> • President-Elect Training (PETS1) • Ensure incoming officers entered into My Rotary • Annual General Meeting • Update club goals for your year in Rotary Club Central • Enter incoming officers into My Rotary 	<ul style="list-style-type: none"> • Club Annual General Meetings
January Vocational Service	<ul style="list-style-type: none"> • Plan and prepare • Rotary International dues 	<ul style="list-style-type: none"> • Governor-Elect Training in San Diego • National Science & Technology Forum • Outbound & Inbound Youth Exchange

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MONTH	PE & PRESIDENT TASKS	DISTRICT EVENT
February Peace & Conflict Prevention / Resolution	<ul style="list-style-type: none"> • Finalise leadership team • Pass RI manuals/links to leadership team • Confirm SPPETS registration • Incoming Officers entered in My Rotary (1st) 	<ul style="list-style-type: none"> • Rotary Birthday (23rd) • District Management Meeting • Rotary Youth Leadership Award (RYLA) applications close
March Water & Sanitation	<ul style="list-style-type: none"> • South-Pacific President-Elect Training (SPPETS) • Register for District Conference and promote within club 	<ul style="list-style-type: none"> • Rotary Learning & Information (WHG) • Governor-Nominee applications close (31st)
April Maternal & Child Health	<ul style="list-style-type: none"> • Enter club goals for your year into Rotary Club Central • District Conference 	<ul style="list-style-type: none"> • District Conference • RYLA • Youth Exchange Applications deadline
May Youth Service	<ul style="list-style-type: none"> • District Assembly • Attend Area Meeting • Work with Treasurer to prepare a draft club budget • Co-ordinate with current President on changeover arrangements • Rotary Foundation & Polio Plus payments made by 31 May • Send Paul Harris Fellow requests to Paramatta Support office in time for changeovers • Changeover arrangements 	<ul style="list-style-type: none"> • District Assembly • Rotary Learning & Information (AKL) • Combined District Management Meeting • Youth Exchange Selection weekend • Model United Nations Assembly (MUNA) • Challenge Camp • RYLA • District Quiz
June Fellowship	<ul style="list-style-type: none"> • Finalise club goals for your year in Rotary Club Central • Club changeover • District changeover • Update final results of club goals in Rotary Club Central for your year • Club Changeover • District changeover 	<ul style="list-style-type: none"> • Rotary International Convention • District Changeover • RANZSE application deadline (30th)
July	<ul style="list-style-type: none"> • Create My Rotary account • Identify resources to support your year • Rotary International dues • First official board meeting – confirm club goals, budget and plans. • Plan for key events • Ensure club goals entered into Rotary Club Central by 1 July for your year • Club Changeovers • Support President-Elect 	<ul style="list-style-type: none"> • Rotary International dues • District Governor visits • NorthTec (Whangarei)