

Rotary District 5495 Secretary Essentials

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District 5495
Rotary
Arizona



**IMAGINE
ROTARY**



Agenda - Objectives

To prepare for your role of Club Secretary!

- Role, responsibilities, and reports
- "My Rotary"
- Summary questions

Membership Changes

The Secretary keeps the club's membership list updated through ClubRunner or [DACdb.com](https://www.dacdb.com) by:

- Adding a former or transferring Rotarian to your membership - using their previous Rotary Identification Number
- Transferring a member to another club - the new club's Secretary will add that member after you transfer him/her
- Terminating a member - removed from Rotary
- Changing status from Active to Honorary
- Adding new members - Provide Rotary application and Membership Packet
- Packets and Rotary merchandise can be ordered from Russell Hampton (<https://www.bestclubsupplies.com>)

Adding New Members



MEMBERSHIP APPLICATION FORM

Rotary International

Proposal for Membership of Rotary Club of _____

Name: _____

Home Address: _____

Postcode: _____

Home Telephone: _____ Mobile: _____

Business/Employer Name: _____

Position Title or Description: _____

Business Address: _____

Postcode: _____

Business Telephone: _____ Fax: _____

Email: _____

Date of Birth: _____

Partners Name _____

Children's Names (and their ages if under 18) _____

Proposed Classification: _____

Previous Rotary Club: _____

Some vocational and personal background details that will enhance your activities as a Rotarian:

I hereby certify that if accepted to Membership of the Rotary Club of _____, that I as a Rotarian, will exemplify the Object of Rotary in all my daily contacts and will abide by the constitutional documents of Rotary International and the club. I agree to pay an admission fee and dues in accordance with the bylaws of the club.

Signature: _____ Date: _____

Proposed Member Nominated by: _____

Board Approval on: _____

<https://clubrunner.blob.core.windows.net/00000013179/en-us/files/homepage/new-member-form/new-member-application-form-.pdf>



What is ClubRunner?

ClubRunner is a set of Online Tools for:

- Membership Management
- Communication
- Web Site Presence
- Saving Files
- Event Management
- Volunteer Management

ClubRunner is a Subscription Cloud Based Service

- Can be run from any computer, tablet and mobile phone app connected to the Internet

**Your club might use DACdb.com
ClubRunner Basics is offered today!**



What Are The Duties of Club Secretary?

- Maintain official records for changes in membership.
- Provide Membership Packets for new members.
- Keep attendance as determined by club
- Send out notices of meetings of the club, Board and committees.
- Record and preserve minutes of the club, Board and Committee meetings.
- Work with Board of Directors to update Club Constitution and Club Bylaws.

Club Constitution and Bylaws

- The Club Constitution
 - Outlines the purpose of the club and provides a framework of requirements for every club.
 - Must be adopted from the standard Rotary Club Constitution (available on-line)
- The Club Bylaws
 - Adapted from the recommended Rotary Club Bylaws.
 - Provides additional provisions for the governance of the club.
 - Can be modified by each club as long as changes are consistent with the RI Constitution and Bylaws.

Check out: <https://my.rotary.org/en/learning-reference/about-rotary/governance-documents>



More Duties of Club Secretary

- Submit (or work with Treasurer) to R.I. the SAR (semi-annual report) by July 1 and January 1
- Ensure R.I. and District Dues are paid by July 1 and Jan. 1
- Ensure the November tax form or postcard is submitted
- Submit the Club Officers report (via Clubrunner) to Rotary International by January 1
- Check official club mailbox and distribute mail as appropriate
- Organize and keep records for the club



And, More Duties of Club Secretary

- Assist President with planning, calendar, and scheduling speakers
- Assist President with the annual goals on Club Central
- Write correspondence - thank you's, email reminders, notices of upcoming events
- Maintain newsletter for members and friends
- Attend the District Conference and represent the club at the legislative session



What kinds of files?



You are the custodian of your club records!

- Club files on events, service, socials
- Club charter, constitution, and bylaws
- Description of club locality
- Club history and record of events, including photos
- Minutes of all club and Board of Directors' meetings
- Annual reports of club officers and committees
- Club rosters
- ???



Have You?



Logged on to MY ROTARY?

<https://my.rotary.org/en/>



What can be done at My Rotary?

- View and change club membership data
- See your club's balance (dues owed)
- Complete the Semi-Annual Report
- Pay club dues (by January 1 and July 1 only)
- Update club data
- View reports for club contributions to The Rotary Foundation
- View the Official Directory of clubs and administrators
- Access the Rotary Foundation Grants System
- Access "Club Central" and "Club Administration"

How to find Club Information on My Rotary

- <https://my.rotary.org/en/>
- Sign in
- Page opens to My Rotary
- From the homepage, you can click on Home ➤ Clubs ➤
Your Club Name
- Then, click on Member Center ➤ Online Tools ➤
Rotary Club Central to find stats, goals, and report areas.
- Then, click on Manage ➤ Club and District
Administration ➤ Club Administration



What can be done at Rotary Club Central?

- Determine, Review, and Update:
 - Club Goals with President
 - Club Statistics
 - Service Goals
 - Input Volunteer Hours
- Assist with Presidential Citation
- Assist with Interact Club Citation
- Get Reports on Club and individual Foundation giving
- Find links to commonly used Resources



What can be found at Club Administration?

Click on topics!

[How to pay your club invoice](#)

[How to add a member](#)

[How to remove a member](#)

[How to edit member information](#)

[How to add a club officer](#)

[How to update club data](#)

[How to manage membership leads \(for clubs\)](#)

How to Learn on My Rotary

- **R.I. Secretary Course** <https://my.rotary.org/en/learning-reference/learn-role/club-roles>
- Click on Learning and Reference ▶ Learning Center
▶ Club Leadership ▶ Secretary Basics for an online course to accompany this class and check your knowledge.

Summary Questions

- What are the main responsibilities of the secretary in your club?
- How will you work with the club president?
- How will you work with the club treasurer?
- How will you ensure that you can report incoming club officers on time?
- How can you support your club's committees?
- How will your club manage its membership leads?
- What are your club's strengths and weaknesses? What should you keep doing, and what can you improve?

Summary Questions

- What is one goal you'll work toward next year?
How does this goal support your club's strategic plan?
- What system will you use to address club disputes or allegations of harassment?
- How will you ensure that your club reflects the entire community?
- How will you track the notices you send and receive?
- Which administrative duties can you do more efficiently?

Every Rotary Club is independent and unique!
Thank you for your presence today!

Good Luck!

