

# Club Secretary Role and Responsibilities



# Introductions

- Name
- Club
- Years in Rotary
- Current Position, if any
- Next Year's Position
- Non-Rotary Job



# Learning Objectives

- Understand the role of the club secretary.
- Identify ways to work with other club leaders.



# Responsibilities

- Maintain membership records.
- Send out notices of meetings.
- Record and maintain minutes.
- Submit required reports to RI.
- Work with treasurer to collect and submit dues and fees.
- Record attendance and send to district governor.



# Member Access



ROTARY INTERNATIONAL®  
THE ROTARY FOUNDATION®

## Member Access

### Sign in to Member Access

Login e-mail: [Forgot login e-mail?](#)

Password: [Forgot password?](#)

Remember me [What is this?](#)

Sign in



[Having trouble?](#)

Don't have a Member Access account?

Create Account

### Announcements

#### Are you new to Member Access?

The first step to getting started is to create an account. Learn how in the [FAQ](#).

#### The deadline to include club officers in the Official Directory is 10 March

To verify that incoming officers have been entered, permanent club mailing address is correct, and meeting information is current, click the "Update Club Data" link located in the main menu.

#### Experience Rotary's new online contribution system

Make a one-time or recurring gift in 12 currencies while preserving existing tax benefits where available. Sign in and click "Contribute to The Rotary Foundation" to make your gift today.

[Contact us](#)

# Submitting Reports

To RI (via Member Access)	To your district governor	To the appropriate club secretary
Semiannual Report	Monthly attendance	Visiting Rotarian attendance
<i>Membership Data Form</i>	Changes in officers or meeting information	Rotarian Relocation Form
Changes in officers or meeting information		

*Official Directory Data*



# Work with the Club Treasurer

- Coordinate actions on attendance reporting, SAR, IRS, RI and District dues, foundation submittals
- RI and District dues notice is driven by the accuracy of your input for new members and terminations
- SAR driven by membership number on July 1st and January 1<sup>st</sup>. When to terminate???
- Help ensure that members pay their dues. Obtain from the Treasurer a list of members whose dues are 30 days late (know Club policy), so that proper notification can be sent.



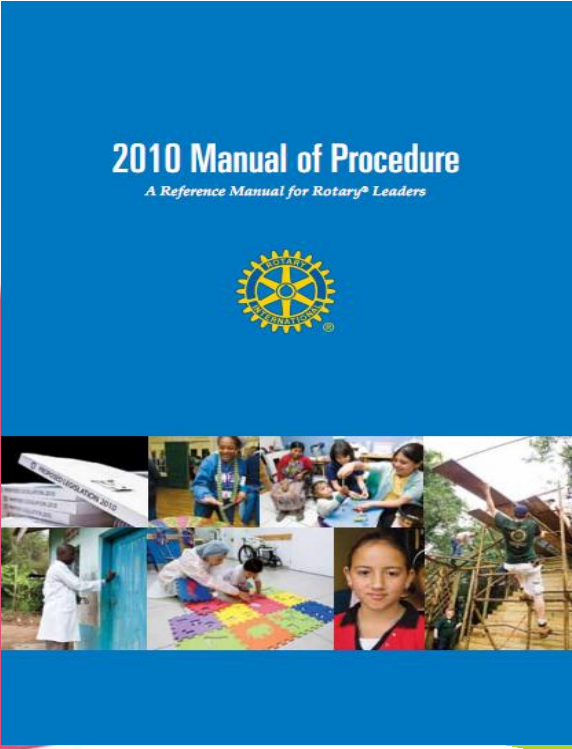
# Rotary Club Semiannual Invoices

**Improved club membership invoices.** Beginning about 1 January 2015, every club received a one-page document that clearly states the amount due. This easy-to-understand invoice replaced the complicated eight-part semiannual report. You will no longer need to recalculate your bill or make adjustments to the invoice. Dues amounts on semiannual invoices will be calculated based on the membership numbers filed by the **Club Secretary** — through Rotary.org, email, or mail — by 1 January and 1 July of each year. Since many clubs had requested this type of straightforward invoice system, on May 07, 2014, RI Past President Ron Burton reported that the change was underway.





# Resources



# Learning Objectives

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- Identify ways to work with other club leaders.



# Club Secretary Case Studies



# Learning Objective

- Identify challenges and solve problems that your club may face.



# Backup



# Club Secretary's Manual functions

- Membership Records
- Attendance
- Making required reports to District 7610 and RI
- Minutes of meetings
- Sending out notices
- Working with other club leaders
- Update the officers for the coming year on the District and RI websites



# Making Required Reports

- Page 13 in the Manual
- SAR - Semi Annual Report
  - Due 1 July and 1 January
  - The dues are prorated for new members and terminated members
  - Keep your records current as initiations and terminations occur
- Monthly attendance report to District 7610
  - Due the 15<sup>th</sup> of the following month
  - Club Runner software—if your club uses it
  - Lapse in attendance—contact the member about makeups



# More about SAR and District Dues

- RI can terminate a club for non-payment of semi-annual dues
  - Each member is \$27.00 semiannually
  - Each member has \$6.00 for the magazine subscription
  - Members are prorated for shorter periods for to match date of initiation or termination
- District Dues due are once a year
  - Each member is \$42.50 for the year
  - Based on total membership on July 1<sup>st</sup>





# Club Secretary Survival Bag

- Printed sheets for attendance at each meeting
- Extra Banners
- Pens, pencil, eraser, post-it notes
- Deck of cards, extra roll of tickets
- Folder with information for prospective new members
- Spreadsheet that shows status of dues payments
- New member data sheets
- District directory
- What's not in the bag? Supplies that are kept on site.



# Time Management

- 60-90 minutes every week for routine things
  - Answering e-mails and interaction with members and officers
  - Interaction with treasurer
  - Picking up mail from the club's post office box
- 60 minutes to do end of month attendance recap
- 60 minutes to assemble a new member packet in preparation for an initiation
- 30 minutes to input new member data

