Secretary Training
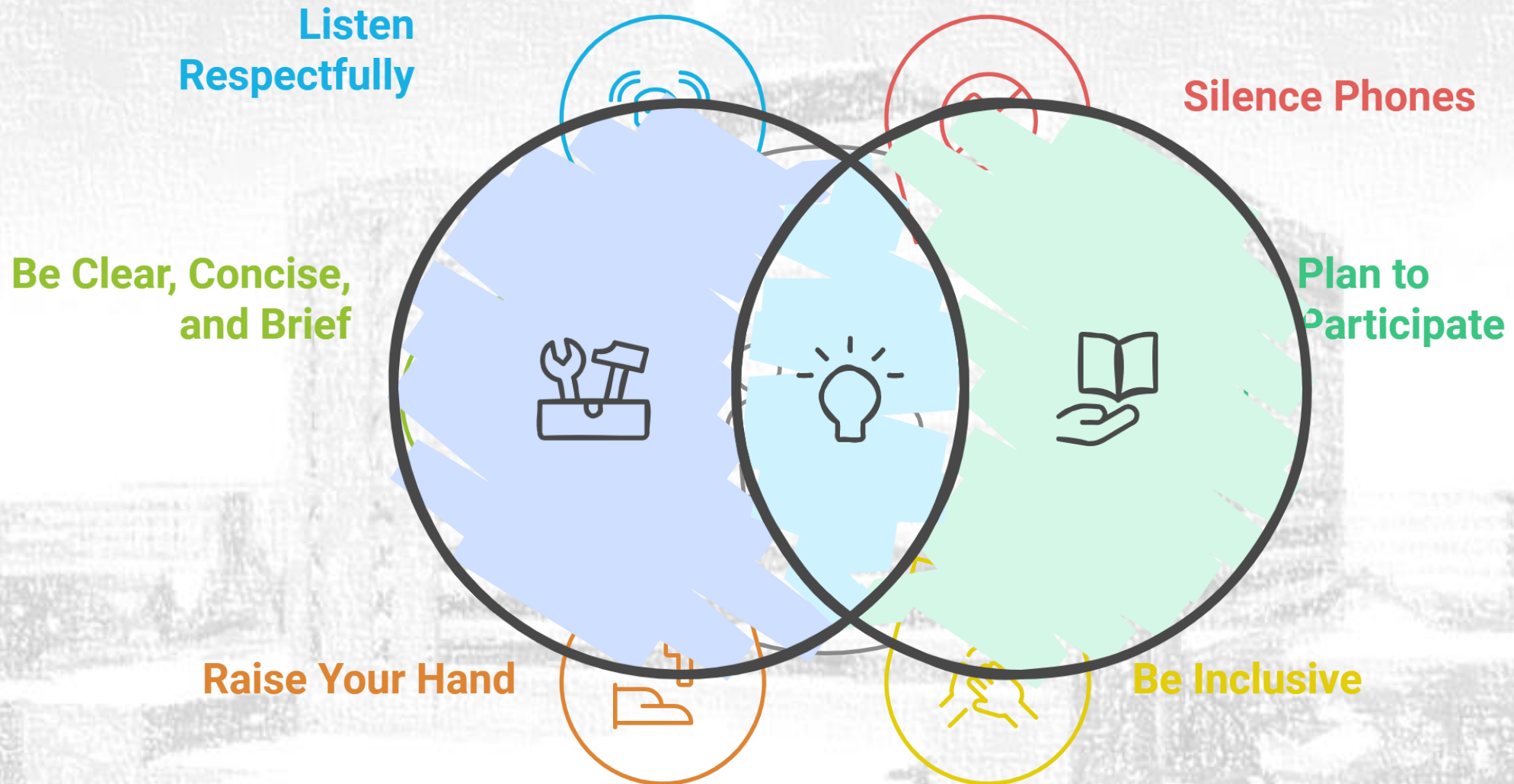
Linda Borton
Rotary Club of Arlington Heights
District 6440
bortonsobon@att.net

Jim Wales
Rotary Club of Chicago Citywide Service
District 6450
Jim.wales1120@gmail.com

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Ground Rules

Listen Respectfully

Silence Phones

Be Clear, Concise, and Brief

Plan to Participate

Raise Your Hand

Be Inclusive

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Getting to Know You

Secretary Training: Learning Objectives

By the end of our three sessions you will:

Understand core role/responsibilities

Know how to prepare

Be familiar with your club management system

Understand how you can work with your Club leadership to ensure smooth club operation

TOGETHER, WE GROW

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Overview of Our Sessions

Session 1

- Roles & Responsibilities
- How to prepare

Session 2

- How to do key tasks in DacDb & ClubRunner

DACdb

ClubRunner

Session 3

- The Big Picture
- Reporting & Communication

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What are the Secretary's Responsibilities?

Club Secretary Job Description

All club secretaries have similar responsibilities that help keep our clubs operating effectively.

RESPONSIBILITIES
Attend the district training assembly and the district conference.
Meet with the previous secretary and receive the club's records.
Meet with the incoming club officers or board of directors to plan the year ahead. Review your club's strategic plan if it's current or talk to the board about updating it.
Update your club's records and member list using My Rotary or your club management system. If you use a club management system, check to make sure that it can submit information to Rotary International.
Make sure that your club has the most recent Rotary governance documents to refer to as needed.
Make sure the club treasurer has the club invoices in time for payment.
Serve on the club board and club administration committee.
Work with the club membership committee to decide who will manage the membership leads process.

Take minutes at club and board meetings and club assemblies.
Update club and officer information for the online Official Directory and Rotary's records.
Manage club correspondence, including responding to emails and sending official notices and invitations.
Keep promotional items, name badges, and other materials that are used at meetings and events.
Preserve your club's historical records.
Write an annual report for the club at the end of the Rotary year.
Assist the club president, treasurer, and committees as needed.
Meet with your successor and give them the club's records.

Club Secretary | July 2022

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Session Two: Learning Objectives

By the end of this session you will:

- Know what functions can/should be performed on ClubRunner

- Be familiar with how to perform core functions

- Understand the difference between ClubRunner and My Rotary and how they integrate

- Know how to find help resources to use club management system

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Core Functions

Add/Delete Members

Assign Access Levels

Update Club Officers

Track Attendance

Reporting

RI Integration

Document Storage

Update Club Information

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Secondary Club Management System Functions

- Communication (Email)

- Committee Management

- Member Search

- Calendar Maintenance

- Event Scheduling

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Live Demo- ClubRunner Core Functions

Adding and Deleting Members

Assigning Access Levels

Updating Club Officers

Tracking attendance

RI Integration

Document Storage

Updating Club Information

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Club Management vs. My Rotary

ClubRunner (CR) vs. Rotary.org/My Rotary (RI)
Where to Enter and Update Information

Item		Where Enter		Results / Actions
		CR	RI	*Assumes RI Integration Opt In set properly by Club*
Active Member	Member Name	X		Also Updates Rotary International
(includes reinstating or	Member Gender	X		Also Updates Rotary International
Transferring member)	Member Birthdate	X		Also Updates Rotary International depending on Privacy Settings
	Member Sponsor	X		Also Updates Rotary International
	Date Joined	X		Also Updates Rotary International. Date must be within 30 days of data entry date.
	Member Contact Info	X		Also Updates Rotary International; be sure to include email
	Primary Email Change	X		Rotary uses the Primary Email in a variety of modules; because of that they will not automatically change the Primary email when entered through ClubRunner; it is best to check on this change and follow-up with Rotary Information as needed
	Transfer Member	X		Enter the member name as formerly at Rotary, enter member number if known; enter the former club as accurately as possible
	Member ID	N/A	N/A	Assigned by RI; fills to Rotary tab on ClubRunner
	Member Join Date	X		Also Updates Rotary International.
Honorary Member		X		Also Updates Rotary International; Locate Name on ClubRunner Active Member list, select change status
Terminating Member		X		Also Updates Rotary International; Locate Name on ClubRunner Active Member list, select change status, select terminate, select reason. Date must be within 30 days of data entry date.
Reinstating Member		X		Also Updates Rotary International; Select Name from ClubRunner Inactive Member list, select change status
Club Officer	Name & Term	X		Also Updates Rotary International; not all officers defined at Rotary Interntaional
Club	Meeting Date/Time	X		Also Updates Rotary International
Club	Meeting Location	X		Also Updates Rotary International
Club	Goals		X	Required for District Grant application
Club	Service Projects		X	Used By District For Profile Tracking
Club	Presidential Citation		X	Most Information is tracked automatically by RI; some items are entered through Rotary Club Central,.

For assistance, including telephone help and tutoring, contact bortonsobon@att.net

Important: All ClubRunner information should be entered into your Club's ClubRunner website- NOT through the District website. Anything that you enter through your Club's site will automatically be updated to the District site

Resources

- Rotary Learning Center ([My Rotary- Rotary Club Central](#))

- Step by step tutorials in Rotary Club Central (under Resources)

- [ClubRunner Support](#)

- District Learning Facilitation Team

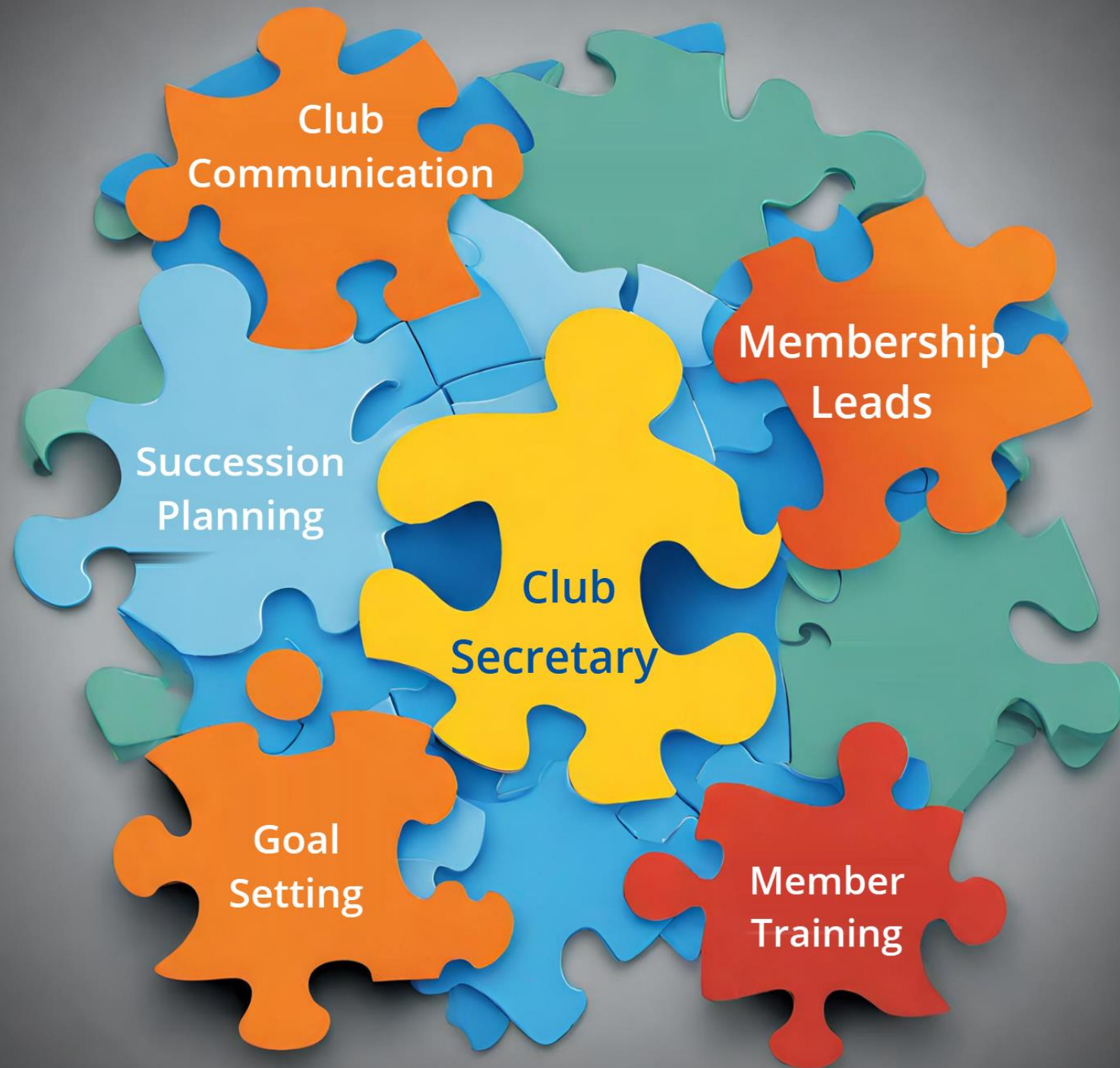- Google

- YouTube

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SECRETARY LEARNING FACILITATION

SESSION THREE: THE BIG PICTURE

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Where do you fit in the Big Picture?

Goal Setting

- How do you do it?

- Who handles it?

- Issues or problems encountered

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The Big Picture

Club Communication

- How do you do it?

- Who handles it?

- Issues or problems encountered

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The Big Picture

Member Training

- How do you do it?

- Who handles it?

- Issues or problems encountered

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The Big Picture

Membership Leads

- How do you do it?

- Who handles it?

- Issues or problems encountered

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The Big Picture

Succession Planning

- How do you do it?

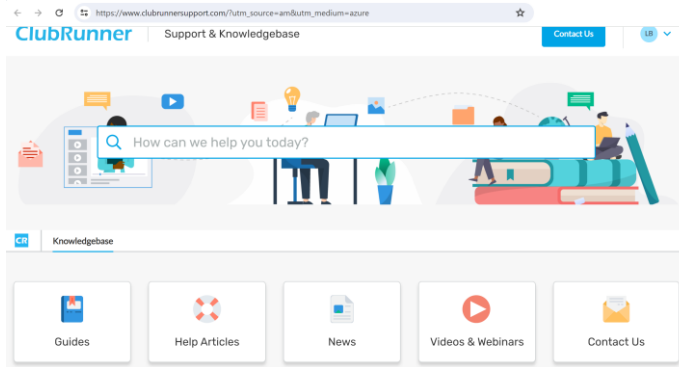- Who handles it?

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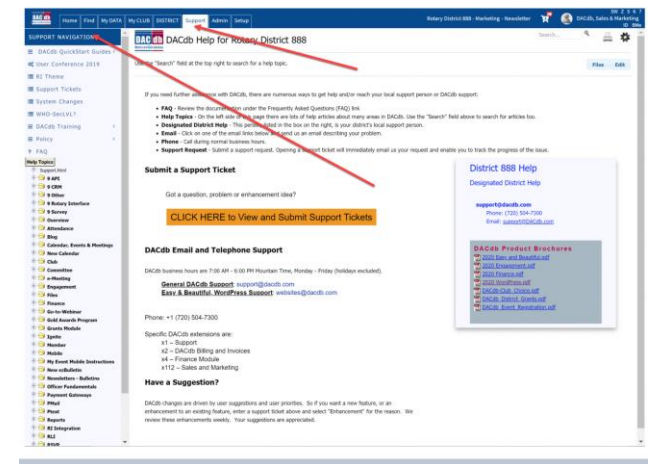
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Resources

My Rotary
Learning Center

ClubRunner
Support

DACdb
Support

Your District Learning Facilitation Team

Google

YouTube

Take Action!

What are your post-session action items?

What goals / changes do have for your Club?

Who are you going to recruit to implement your action items?

How are you going to share your vision?

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Thank You

Linda Borton
Rotary Club of Arlington Heights
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Jim.wales1120@gmail.com

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