



Rotary
District 7080



CLUB SECRETARY TRAINING



2019-2020
Club Leadership Training



Presented by
Susanne Zbinden
Rotary Club of Orangeville

AFTER THE PRESENTATION

Rotary
District 7080



I am available for questions (almost) anytime. Please
feel free to contact me at susannezbinden@me.com

We can also have a phone chat, another Zoom or
FaceTime meeting.

Please contact me by email to plan a conversation.



PRESENTER

SUSANNE ZBINDEN

Past President, Secretary - Rotary Club of Orangeville
 Assistant Governor - Dufferin-Erin-Caledon Cluster
 District Annual/Endowment Fund Chair
 Member District Training Committee



SUSANNE ZBINDEN



SUSANNE ZBINDEN

susannezbinden@me.com

- Degrees in Linguistics and International Relations (UM Oxford, UH Manoa, FIU Miami)
- Professional Certificate in Project Management (UWO Continuing Studies)
- Certified Director of Safety in Transportation Safety, CDS (UCF Continuing Education)
- Certified Protocol and Business Etiquette Consultant (Protocol School of Washington)



SUSANNE ZBINDEN

susannezbinden@me.com



TRAINING OBJECTIVES

Rotary
District 7080



- ⦿ Understand the Role as defined by RI
- ⦿ Tasks of a Club Secretary
- ⦿ Required Responsibilities
- ⦿ Optional Duties
- ⦿ Resources

Rotary
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UNDERSTAND THE ROLE AS DEFINED BY ROTARY INTERNATIONAL



DEFINITION BY RI

"As the Club Secretary, your primary responsibility is to help the club function effectively."

RI Club Secretary Manual



CLUB SECRETARY

- ⚙️ Help your club run effectively & efficiently
- ⚙️ Support Officers & Board of Directors
- ⚙️ Share information with Club, Cluster, District & RI



TASKS OF A CLUB SECRETARY



**Tasks can vary from club to club,
depending on size and structure**




- | | |
|--|---|
|  Updating Membership Data |  Club Meetings |
|  Roster |  Minute Keeping: |
|  Attendance | ✓ Board Meeting |
|  Correspondence | ✓ Club Meeting |
|  Records & Archives |  Club Bulletin |
|  Order Supplies: |  Website |
| ✓ Pins, Certificates |  Elections |
| ✓ Membership Kits |  Bylaws |



REQUIRED RESPONSIBILITIES



UPDATING MEMBERSHIP DATA

-  Reporting to RI
- ✓ Manual Form - Fillable PDF
- ✓ My Rotary - Sign up for account
- ✓ ClubRunner - Sync with RI
-  New Member Proposal Form
-  New Member Kits

Rotary MEMBER DATA FORM

(R)-(1119)

Club secretaries can report membership changes or Rotarians can make changes to their member information through myrotary.org instead of using this form. Privacy is important to RI and the personal data provided will be shared with RI, your Rotary club and district office (or their delegates), or to official Rotary business. For further information, see [Rotary's privacy policy](#). This form can be used to report new or transferring 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 [Rotary.org](#) and one copy to your district governor, keep a copy to your club file, and send the original form to:

ROTARY INTERNATIONAL, 1560 Sherman Avenue, Evanston, IL 60201-3698, USA

Fax: +1-847-656-2207

Email: info@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 an ID# by RI.

Mailing Address: NUMBER AND STREET: _____ CITY: _____

STATE/PROVINCE: _____ COUNTRY: _____ POSTAL CODE: _____

EMAIL: _____

☐ **ADD MEMBER**

☐ Male ☐ Female Birth Year: _____ DATE OF ADMISSION: _____

*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**

☐ **Change of Address** DATE OF CHANGE: _____

OLD Mailing Address: _____ NEW Mailing Address: _____

NUMBER AND STREET: _____ CITY: _____ NUMBER AND STREET: _____ CITY: _____

STATE/PROVINCE: _____ COUNTRY: _____ STATE/PROVINCE: _____ COUNTRY: _____

POSTAL CODE: _____ 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: _____

Current Reason for Termination (check one)

☐ Non-attendance (1) ☐ Non-payment of club dues (2) ☐ Business obligations (3) ☐ Family obligations (4)

☐ Health (5) ☐ Personal (6) ☐ Moving new club (7) ☐ Relocation (8)

☐ Deceased (9) ☐ By club for cause (10) ☐ Lack of participation (11)

**If reason for termination is health, please see the Member file for an appropriate certification.

CLUB SECRETARY OR ROTARIAN (PRINT NAME): _____ SIGNATURE: _____ DATE (MM/DD/YYYY): _____

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MY ROTARY

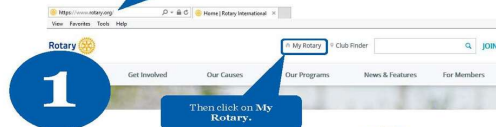
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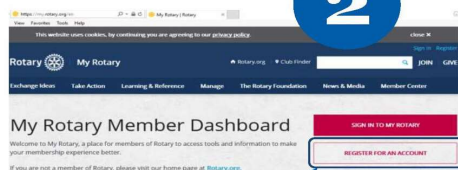
HOW TO CREATE A MY ROTARY ACCOUNT



First go to www.rotary.org



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MY ROTARY

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3 If you are not a first time user, enter your email address and password. Then click on Sign In.

If you are a first time user, click on Create account.

SIGN IN

Sign in Email *

Forgot email?

password *

Forgot password?

Remember me

SIGN IN

WHY CREATE AN ACCOUNT?

Logging in to My Rotary gives you a customized experience and easier access to tools and information that are relevant to you.

Account can create an account and sign in. Existing Member Account users can re-register with their current user ID. For tips on registering and using the site, see our [help resources](#). For assistance, contact us.

CREATE ACCOUNT

ACCOUNT REGISTRATION

Fill in the Account registration information and click on Continue.

First Name *

Last Name *

Sign In Email *

Are you 18 years old or older? *

YES

CONTINUE

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5 You will be informed that an e-mail has been sent to you.

Rotary.org > MY ROTARY

Rotary

ACCOUNT REGISTRATION

Thank you for registering, you've completed the first step in the process. You will receive an email sent to your sign-in email with a link to activate your account.

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6 Complete your Rotary.org registration

Hi!

You're just one step away from connecting leaders, exchange ideas, and more.

Activate my account

ACCOUNT SET-UP

Thank you for registering your account. Just a few more steps to complete the process.

REQUIRED

CREATE PASSWORD *

Your password must be at least eight characters and contain one lowercase letter, one uppercase letter, one number, and one special character.

Confirm Password *

Is your email verified? *

YES

CREATE ACCOUNT

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8 Fill in all the mandatory information and click on Create account.

ACCOUNT SET-UP

Congratulations, your account was successfully created.

Thank you for your interest in My Rotary.

As part of becoming a registered user of My Rotary, you will receive an email with a link to verify your email address and complete your profile. Please click on the link to verify your email address and complete your profile.

Click on Continue.

9 Congratulations! You have created your My Rotary account.

Rotary.org > MY ROTARY

Rotary

My Rotary

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MY ROTARY



To Update Membership Data

- In MyRotary → Manage → Club Administration
- Club & Member Data
- ✓ Add, edit or remove members
- ✓ Add, edit or remove club officers
- ✓ Add a new member sponsor

MY ROTARY



→ Add a member

- ✓ Click on **"Add Members"** Icon and fill out the information
- To edit a member info
 - ✓ Click on **"Edit"** next to member's name, make changes
- To remove a member
 - ✓ Click on **"Terminate"** next to member's name, make changes

MY ROTARY



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

CLUB RUNNER



To Update Membership Data

- Log into Club Runner → Member Area
- For Clubs → Membership Lists

- ✓ Add a member click on **"Add New Member"** icon and fill out the information
- ✓ To edit or remove a member, click on **"Change Status"** next to member's name, make changes

MY ROTARY

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<https://rotary7080.org/>

CLUB RUNNER

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-  Be sure you save all changes
-  Be sure to have RI integration activated for automatic information transmission to the RI system.
-  Synchronization only works automatically from ClubRunner to RI.

ROSTER



- ⚙️ Make sure that all member information is updated.
- ⚙️ Check roster on RI and ClubRunner for accuracy before Januar 1 and July 1
- ⚙️ Ask members to access ClubRunner and MyRotary to update their information
- ⚙️ Distribute or make available to club members

ATTENDANCE



- ⚙️ Generate Member Checklist
 - ✓ Record Meeting Attendance
 - Update ClubRunner by the 15th of the following month
 - ✓ Record Make-up Meetings
 - ✓ Leave of Absence
 - ✓ Rule of 85
 - ✓ Other Attendance Exemptions
(different from club to club)

RULE OF 85 - ATTENDANCE EXEMPTION

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Art. 10, Section 5(b) of the *Standard Rotary Club Constitution* states:

"The member's absence shall be excused if, the sum of the member's age and years of membership in one or more clubs is 85 years or more, the member has been a Rotarian for at least 20 years, the member has notified the club secretary in writing of a desire to be excused from attendance, and the board has approved."

BOARD MEETINGS

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 Notice of Meeting

 Written Report

 Meeting Agenda

Be sure to record:

- ✓ Date, Time and Place
- ✓ Members/Guests present
- ✓ Quorum
- ✓ All motions and votes
- ✓ Details only as pertains to motions

CLUB MEETINGS



- ⚙ Assist President with meeting agenda
- ⚙ Keep minutes/notes of meeting (can be a bulletin/newsletter)
- ⚙ Write bulletin after meeting (or delegate)

Be sure to record:

- ✓ Date, Time and Place
- ✓ Members/Guests present
- ✓ Quorum
- ✓ All motions and votes

CORRESPONDENCE



- ✓ Enter meeting attendance in ClubRunner
- ✓ Enter incoming executive in ClubRunner and RI
- ✓ Credentials for Convention & voting delegate(s) to attending delegate
- ✓ Visiting Rotarian make up confirmation
- ✓ Other official notices & invitations
- ✓ Order Paul Harris certificates
- ✓ Order Club Supplies

ELECTIONS



- ✓ Call for Nominations (some clubs have a nominating committee)
- ✓ Notice of Annual Meeting and Election (before December 31st)
- ✓ Slate of nominations or acclamation
- ✓ Prepare ballots if required
- ✓ Appointment of Scrutineers



OPTIONAL RESPONSIBILITIES

BULLETIN, NEWSLETTER



Format can change from club to club as some clubs have subcommittees for the following:

- ✓ ClubRunner allows you to have different formats for different audiences
- ✓ Send out bulletin to members, Friends of Rotary, prospective members, event sponsors, media etc.
- ✓ Post on club website, Social Media platforms
- ✓ Write press releases & articles for local newspapers



RESOURCES



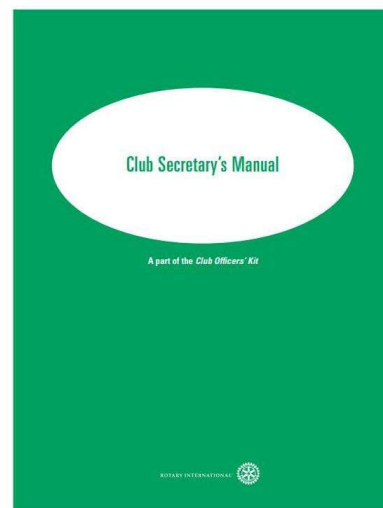
- District Leadership Training Session
- Secretary's Manual
- Standard Rotary Club Constitution
- Your Club's Bylaws
- Club Policies and Procedures
- My Rotary - Learning Center
- Assistant Governor in your cluster



Current Secretary - your BEST resource!

Secretary's Manual

- Part of the Club Officer's Kit
- Can be found online (Rotary Club Secretary Manual)






- ❁ Standard Rotary Club Constitution
- ❁ Recommended Rotary Club Bylaws

Available on rotary.org




Available on rotary.org






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MyRotary - Learning Center



Club Secretary Basics
11 courses

The course has 11 modules and takes approx. 3 hours to complete.

-  Get Ready: Club Secretary
-  Club Administration
-  Working with your club leaders Using a Club Management System
-  Protecting Personal Data and other topics



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MY ROTARY

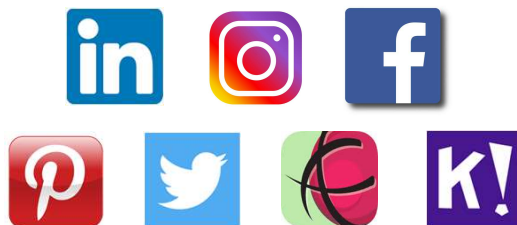
<https://my.rotary.org/en>



Please feel free to contact me if you have any questions:
susannezbinden@me.com



You can connect with
me on the following
platforms:



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