

# GET READY: CLUB SECRETARY



This *Get Ready: Club Secretary* textbook is partly extracted from RI online Learning Center course. Please visit the Rotary's Learning Center for further information needed on the Rotary website: [Rotary.org](https://www.rotary.org).

Translating Committee  
Rotary Centre in Thailand  
February 2026

# Get Ready: Club Secretary

## Course Description

Learn about your role as a Rotary or Rotaract club secretary, the resources that are available to help you manage club and membership information, and questions to consider as you prepare for your role.

Updated August 2025

## Contents

Your role	<b>1</b>
Your year	<b>2</b>
Managing member information	<b>5</b>
Working with the president and committees	<b>7</b>
Voting and electors	<b>10</b>
What's next	<b>12</b>
Resources	<b>13</b>
Appendix	
Club Secretary Essentials: Learning plan description	<b>14</b>



# Your role

As a club secretary, you play a vital role in keeping the club organized, informed, and connected. Read below to learn more about how to handle administrative tasks to support your club's success.

- Attend the club leadership learning seminar and, if your district holds one, the district conference.
- Meet with the previous secretary and receive the club's records.
- Meet with the incoming club officers or board members 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 receives the club invoice 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.
- Manage the use and storage of 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.

① Some clubs have both a club secretary and an executive secretary/director. The executive secretary/director may be paid and is not required to be a member.

Rotary International recognizes the **club secretary** as the official contact, so make sure that the person in this role is reported to Rotary. Listing one person in both roles offers them no added access. If your club doesn't have an executive secretary/director, you can assign another officer to that role to give them access to online tools.

# Your year

Use this calendar to help you plan your tasks and prepare for your role.

## January-June

### Prepare for your term

- Become familiar with Rotary's governance documents, such as the Standard Rotary Club Constitution or Standard Rotaract Club Constitution, as well as your club's bylaws.
- Meet with the **president-elect** to:
  - Discuss club goals
  - Schedule club activities
  - Decide how you'll divide administrative tasks
  - Decide who will manage membership leads for your club
  - Determine how you'll handle club communications
- Meet with the **current secretary** to:
  - Review club procedures
  - Review the club invoice
  - Discuss how the current leaders have managed membership leads
  - Get access to the club's records, archives, and other property
- Meet with your club's membership committee to discuss its initiatives and how you can support them.
- Subscribe to Rotary newsletters that support your club's activities.
- Participate in your club leadership learning seminar.
- Attend meetings of the current and incoming board of directors, if you're invited.
- Participate in the club assembly held by the president-elect after the club leadership learning seminar to discuss club plans for the coming year.
- Work with club leaders to set targets for the priority goals in Rotary Club Central.
- Prepare a schedule for sending statements of club dues and fees to all members (monthly, quarterly, or twice a year), and plan how you'll record the dues and fees you receive.



## July

### Take office

- Update your club information and maintain accurate membership records throughout the year using My Rotary or your club management system. Whenever you do this and whichever system you use, check My Rotary to confirm that the information is reflected there. If it is not, Rotary International may not have received the updates.
- Make sure new club officers have been reported to Rotary so they have access to online tools and resources.
- Rotary club secretaries: Make sure the club treasurer has received the club invoice so it can be paid on time, within 60 days. (A sample invoice is below.)

Rotary 		CLUB INVOICE — JANUARY 2022	
Rotary Club of		INVOICE NUMBER	INV-0009591431
Chicago, IL, United States		CLUB NUMBER	
JAN-JUN CHARGES		ROTARY CLUB OF	Chicago
QUANTITY	UNIT OF MEASURE	DESCRIPTION	DISTRICT
119	Members	CLUB DUES	6450
14	Months	Pro Rate Dues	01-01-2022
124	Subscriptions	Rotary Magazine - Paper	
11	Months	Rotary Magazine - Paper Pro Rate	
4	Subscriptions	Rotary Magazine - Digital	
NOTIFICATIONS		PAYMENT DUE UPON RECEIPT	
Want to go paperless? Opt your club out of the paper invoice in My Rotary under Edit invoice preferences.		<b>5,025.62 USD</b>	
QUESTIONS?		UNIT PRICE (USD)	TOTAL (USD)
Contact :		35.00	4,165.00
T:		5.83	69.62
E:	@rotary.org	6.00	744.00
		1.00	11.00
		6.00	24.00
		TOTAL JAN-JUN CHARGES	5,025.62
		PREVIOUS BALANCE	0.00
		TOTAL CLUB BALANCE (USD)	5,025.62

## December-February

### Midyear tasks

- **By 31 December**, confirm that your club's membership data is current in My Rotary so you receive an accurate club invoice. If you use a club management system, make sure that any updates are sent to Rotary by confirming that they are reflected in My Rotary.
- Whenever you report new club officers or members, check My Rotary to confirm that Rotary received your updates.
- Prepare the midyear progress report to outline the club's status and achievements so far this year.
- Review the club's schedule of activities with the president and the club board.
- Support the annual meeting to elect club officers.
- Make sure the treasurer has received the club invoice so it can be paid on time.
- Work with the president to report the club's achievements toward the Club Excellence Award in Rotary Club Central.
- Report next year's club officers using My Rotary or your club management system by **1 February**.
- If you want to propose a governor-nominee-designate candidate, send the resolution that supports the decision and the governor-nominee-designate form to the district nominating committee. Follow the instructions and timeline given by the district governor.

## *April-June*

### **Preparing for next year**

- Begin briefing next year's secretary.
- Prepare your annual report to the club.
- Give the club's records, archives, and other property to the incoming secretary.
- Confirm that your club's membership data is current in My Rotary **by 30 June** so that you'll receive an accurate club invoice. If you use a club management system, make sure your information is being sent to Rotary.

- ① According to the Rotary Code of Policies section 10.050., the club secretary is responsible for promptly reporting membership information to Rotary International in addition to other duties listed in the club constitution and bylaws. The Rotary club secretary also needs to report next year's club officers to Rotary International by 1 February.

# Managing member information

Your primary responsibilities as secretary are keeping your club member lists current and reporting that information to Rotary. Let's quickly review some facts about membership.

Rotary recognizes two membership types: active and honorary.

## ACTIVE MEMBERS

### Active club members:

- Include Rotarians and Rotaractors
- Are counted in Rotary's membership totals
- Pay Rotary International dues
- Can vote on club matters
- Can become club officers
- Can serve as district governor, if they're Rotarians



## HONORARY MEMBERS

### Honorary members:

- Do not pay Rotary International dues
- Do not qualify to vote or become officers

Rotary or Rotaract clubs might offer honorary membership to someone who doesn't have time to be an active, dues-paying member. An honorary membership could also allow active members of other clubs to show allegiance to a second club (for example, in a place where they live for part of the year).

Your club can offer various types of active membership to help attract and retain members, including family, associate, junior, or corporate memberships. The club sets its own policies on club dues and service expectations for each type of active membership. Update your club's bylaws to reflect these policies and to detail each type of club membership, its eligibility rules, and the club dues such members will pay. (Remember that you need to report all of these members as active and collect RI membership dues from them.)

Rotaractors can also be dual members, which means that they can join a Rotary club while remaining members of their Rotaract clubs.

## Common tasks associated with membership information

### Keeping the member list current

The best way to keep your club member list current is to enter any changes in My Rotary or your club management system as soon as they occur, but certainly no later than 30 June or 31 December for Rotary clubs. This ensures that your club invoice will be accurate. If you use a club management system, work with your vendor to make sure Rotary International receives the information.

### **Counting satellite club members**

If your club sponsors a satellite club, the members of the satellite club are officially members of your club. But membership updates for the satellite club aren't managed in My Rotary. You can send member updates for a satellite club to Data Services at [data@rotary.org](mailto:data@rotary.org).

### **Helping manage membership leads**

You can review information about prospective members who have been referred to your club on the Manage Membership Leads page in My Rotary. You'll receive email notifications about new candidates or members who are transferring from another club. When someone in your club moves away, you can also refer them to a club in their new community using the Manage Membership Leads page.

Work with your club president and membership chair to review and update candidates' status as they progress through the process.

### **Issuing member ID cards**

You may want to issue identification cards, which members of your club can show when they attend a meeting of another club. The card is intended for personal use only. Many of the licensed vendors listed on My Rotary sell these cards, or you can use the templates in the Brand Center to make them.

### **Handling a member's transfer into your club**

When someone transfers from a different club, ask their previous club to confirm their membership and that the person doesn't owe the club or district any money. RI and district dues that were paid to the previous club will be valid until the next invoice period. If you don't receive a statement from the previous club within 30 days, assume that the person doesn't owe any money.

You'll need to enter a start date for the person's membership in your club. It's best to use the day after they left their previous club so that their records will show continuous membership.

# Working with the president and committees

Meeting with the current club leaders before you take office will help you learn more about the club's goals, projects, and activities. Attend meetings of the current board, if you can, to learn administrative procedures and ensure continuity. You'll coordinate the most with the president and treasurer. Find details about how to work with them below.

## **PRESIDENT**

Before the year begins, meet with your club president to discuss your roles and responsibilities and how you'll work together. For example, the president might lead club meetings, but you might help plan them and make logistical arrangements, such as:

- Preparing any announcements
- Planning programs
- Scheduling guest speakers
- Distributing and collecting name badges
- Making travel arrangements, handling expenses, or sending thank-you notes for speakers
- Helping visiting members, including providing any documentation they need



Club secretaries will also want to discuss which duties should be assigned to other club leaders and how you can delegate your online access to them

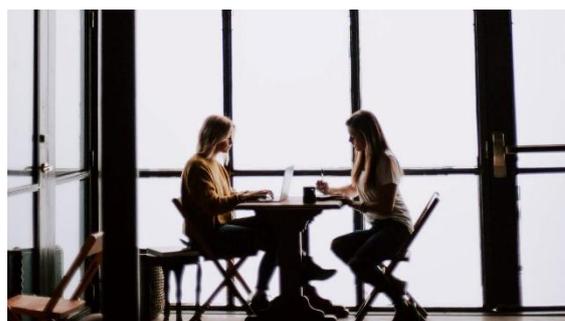
## **TREASURER**

The secretary and treasurer work with the president to ensure that the board reviews the club's finances and that invoices are paid on time. You share several responsibilities, including:

- Collecting and recording dues and fees
- Reviewing the club invoice and paying it on time
- Making arrangements to collect any unpaid dues and fees
- Paying for meals
- Submitting Rotary Foundation contributions on behalf of your club
- Reporting the club email address in My Rotary to ensure that you receive the club invoice

Decide together how you'll approach each task to help your club run efficiently. You'll also work together to prepare the report that includes the income and expenses for the previous year and the first half of this Rotary year. It is presented to the club by 31 December.

You'll prepare an annual report to present at the final club meeting of the year. Because the club president also prepares a report, collaborate with them to avoid redundancies. Your report should review what's happened during the year, including decisions by the club's board, changes to bylaws, membership gains or losses, and any continuing projects that the president doesn't discuss in their report.



## Additional duties for you and the president

The president and secretary handle any disputes or reports on harassment by taking the necessary administrative steps. The board reviews and addresses these issues by examining them thoroughly and making the formal decisions. Determine your process together and share it with members.

Consider these key points during your meetings:

- All members should feel welcome, respected, and valued. Club leaders must set the tone and model inclusive behavior.
- Clearly communicate how your club ensures fairness in roles and processes.

## Administration committee

The club secretary often serves on the administration committee. The committee's responsibilities include:

- Planning interesting club meetings and fun social events
- Producing club communications, such as a newsletter
- Helping the club treasurer collect membership dues if necessary

Work with the administration committee to keep members informed through the club's newsletter, website, and social media. Provide content like committee reports, board decisions, and updates from the governor's monthly message. You can also find material in Rotary magazine, in your regional magazine, or on My Rotary.

Below, read about common tasks you and the administration committee will typically handle together.



## Communicating with the governor and Rotary staff

- **Inform your district governor**  
Share special club activities and achievements with your district governor. They can pass the news to assistant governors and other clubs.
- **Post on the Service Project Center**  
Highlight successful projects and events in the Service Project Center to showcase your club's impact and inspire others.
- **Tell Club and District Support**  
If your club has developed successful initiatives, share them with Club and District Support. Rotary's staff may feature them in publications or on My Rotary.
- **Discuss club health**  
Use the governor's visit to talk about attendance, engagement, and overall club health.

## Documentation

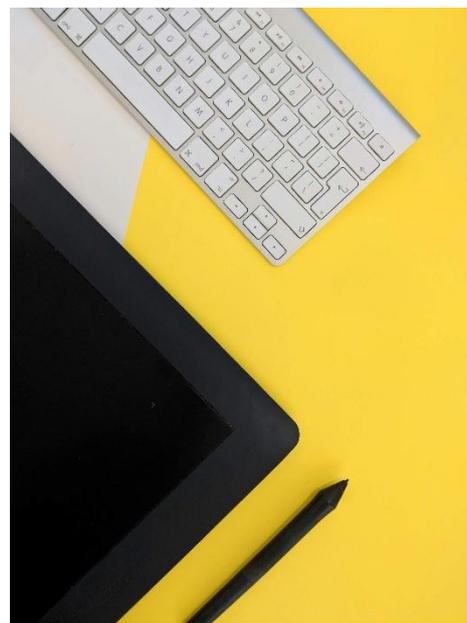
### Managing club records and archives

As club secretary, you're responsible for maintaining all club records. Start by requesting files, supplies, and equipment from the previous secretary.

### Materials to retain

Your club may need to keep:

- Membership applications and the list of charter members
- Documentation of name or meeting location changes
- The club charter certificate
- Club constitution and bylaws (with amendments)
- Meeting notices and minutes
- News articles, photos, videos, or slides featuring club activities



Always follow **Rotary's Personal Data Use Policy** when you store and share records.

### Accessing historical information

To check if Rotary has important documents related to your club's history, write to **history@rotary.org**.

### End-of-year documentation

Throughout the year, keep records of club activities and any communications with Rotary or the district. At year's end, collaborate with the president or administration committee to create an **annual report** for your archives, including:

- A summary of activities
- Photos of officers and events
- Names of new members
- Key accomplishments

# Voting and electors



If you're a Rotary club secretary, you're expected to attend the district conference if your district holds one. The conference is your chance to learn more about Rotary and district programs and to meet other leaders in your area.

The conference may also include a district legislative session, where club electors discuss and vote on important district matters.

## Electors

Here are some important guidelines about the district legislative session.

### Electors selection

- Collaborate with your club president to choose electors for the district conference.
- Only **active members** of **active clubs** qualify.

### Electors allocation



- Each club gets at least one elector. **After the first 25 members, a club gets one more elector each time it reaches a majority of the next 25.**
- Elector count is based on active membership:
  - Up to 37 members — **1 elector**
  - From 38 to 62 members — **2 electors**
  - From 63 to 86 members — **3 electors**

And so on.

- Use the **official member count** from the latest club invoice before the district conference.
- **Honorary members** aren't counted.

## Voting rules

- All electors from a club must vote **unanimously**.
- If a club's votes are split, none of the votes are counted.

## Proxy

If the district governor approves, **proxies** can vote on behalf of absent electors.



Although Rotaractors cannot vote during a district legislative session, Rotaract club members should discuss upcoming proposals with a Rotary club. Giving your opinion on these matters is a key way to take part in the process.



## Credentials certificates

Your governor will supply the credentials that electors present to show that they are qualified to vote on behalf of their clubs. For each of your club's electors:

- 1 Complete the certificate by including:
  - The elector's name
  - The membership total for the club and the number of electors it can have
  - The signatures of the club secretary and president
- 2 Give the certificate to the elector to present to the credentials committee at the beginning of the conference.
- 3 File a copy of the certificate in your club's records.

ⓘ Make sure that your Rotary club has paid the approved district fees for the year. Unpaid fees may affect your club's eligibility to vote. The district governor reviews each club's voting status.

# What's next

**You've learned a lot about how to prepare for your role. Think about these questions as you prepare for the club leadership learning seminar:**

- How will you work with the club president and committees to support your club's goals?
- How will you work with the club treasurer?
- How do you make sure that the member and officer information you report to Rotary International is correct and is received on time?
- How will you contribute to managing your club's membership leads efficiently?
- How will you encourage your club's officers and members to create My Rotary accounts so that they can get more resources and tools and make use of other member benefits?
- What system will you use to address club disputes or allegations of harassment?

# Resources

---

Becoming familiar with the resources below will help you succeed in your role.

## **Rotary governance documents**

Use these documents to get guidance on club operations and policies: the Rotary Code of Policies, the Standard Rotary Club Constitution or Standard Rotaract Club Constitution, the Manual of Procedure, and your club's bylaws.

## **Membership leads**

Get information about prospective members who have been referred to your club from the Manage Membership Leads page. You can also use the tools on this page to refer a member who is moving away and transferring to a club in their new community.

## **Rotary Club Central**

Visit Rotary Club Central to enter your club's goals and track your progress toward the Club Excellence Award.

## **Changes to member email addresses**

Write to [data@rotary.org](mailto:data@rotary.org) if you need to update members' email addresses and other contact information. Or update records through My Rotary or your club management system.

## **Club management systems**

The Club Management Systems page explains how to choose a club management system and how to integrate member and officer information into My Rotary if you use one.

## **Membership resources**

Visit the Membership page for resources like the Club Health Check and other assessments, tips, and information.

## **Official Directory**

Update your club's information to make it easier for people to contact or visit your club.

## **Rotary newsletters**

Stay informed about what's happening in the Rotary world by subscribing to newsletters about membership, service, grants, and more.

## **How-to guides**

Download guides to My Rotary that provide step-by-step instructions on topics such as how to add members, manage club officers, update club details, and pay your club invoice.

## **Brand Center**

Visit Rotary's Brand Center to find banners, images, ads, presentations, and many other items and templates, all of which comply with Rotary's brand guidelines.

## **Licensed vendors**

Refer to this site for a list of vendors that have been licensed to sell Rotary-branded merchandise.

Appendix

# Club Secretary Essentials: Learning plan description

Learn about your role as club secretary, how to work with club leaders, and how to manage your club's membership and administrative data.

Updated July 2025

## Courses in the Learning plan

- Getting Started with the Learning Center
- Managing Club Business
- Working with other Club Leaders
- Minimizing Risk
- Rotary Club Central Resources
- Online Membership Leads
- Protecting Personal Data
- Preventing and Addressing Harassment
- Rotary's Action Plan and You



