



**Rotary**  
**District 5500**



***UNITE  
FOR  
GOOD***



D5500 Club Secretary Training  
17 May 2025    Leo Lawrenson

# AGENDA

- Club Secretary Duties
- Preparing to Be a Club Secretary
  - Things to Think About
- Tools for the Club Secretary
  - DACdb/ClubRunner/My Rotary and Other Digital Tools
  - Additional Club Secretary Resources
- Questions/Sharing



# SECRETARY DUTIES (from My Rotary – the LONG list)

- 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.

# SECRETARY DUTIES (from My Rotary – the **SHORT** list)



- 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.
- **Record attendance at Club Meetings**

# SECRETARY DUTIES (the SHORT list w/ Primary Tools)

- Update your club's records and member lists: [DACdb/ClubRunner](#) (RI if needed)
- Make sure that your club has the most recent Rotary governance documents: [MyRotary – RI Club Constitution & Bylaws](#)
- Serve and vote on the club Board of Directors
- Take minutes at board meetings: [MS Word/AI](#)
- Update club and officer information for the online Official Directory and Rotary's records: [DACdb/ClubRunner](#)
- Order name badges and other supplies: [Russell Hampton Website](#)
- Record attendance at club meetings: [Printed Roster](#) or [DACdb/ClubRunner](#)
- Help set and update Club Goals: [Rotary Club Central](#) ←



# CLUB EXECUTIVE SECRETARY

- OPTIONAL Club Executive Secretary/Director can handle administrative duties IN ADDITION TO the official Club Secretary (not in place of!)
- Only role that can be held by a nonmember and the only one that can be a paid position

**D5500 Clubs w/ Executive Secretaries ->**

- Fort Yuma
- Mountain Empire-Sonoita
- San Luis Frontera
- Sierra Vista Sunrise
- Tubac
- Tucson



# PREPARING TO BE A CLUB SECRETARY



## LEARN ONLINE

- Access the Learning Center and complete:
  - [Club Secretary Basics learning plan](#)
  - [Club Administration Committee Basics learning plan](#)
- Other courses and learning plans based on your needs



## LEARN TOGETHER

- Attend the district training assembly
- Participate in the district vibrant club workshop



## WORK TOGETHER

- Accompany the current secretary as they conduct club business
- Meet with your assistant governor
- Meet with other club secretaries in your area



## PLAN

- Review your club's goals in Rotary Club Central
- Set goals for your role
- Observe club board meetings



# THINGS TO THINK ABOUT

- Where are YOUR club's minutes archived?
- Are they accessible to all your club members?
- Do you use Cloud Storage/Website Storage
  - Shared access?
  - Broadcast links to the club minutes?
- Do you know where your club materials, awards, membership information are located?
- Do you help budget for new materials, awards, pins?
- Do you order them? How do you do that?

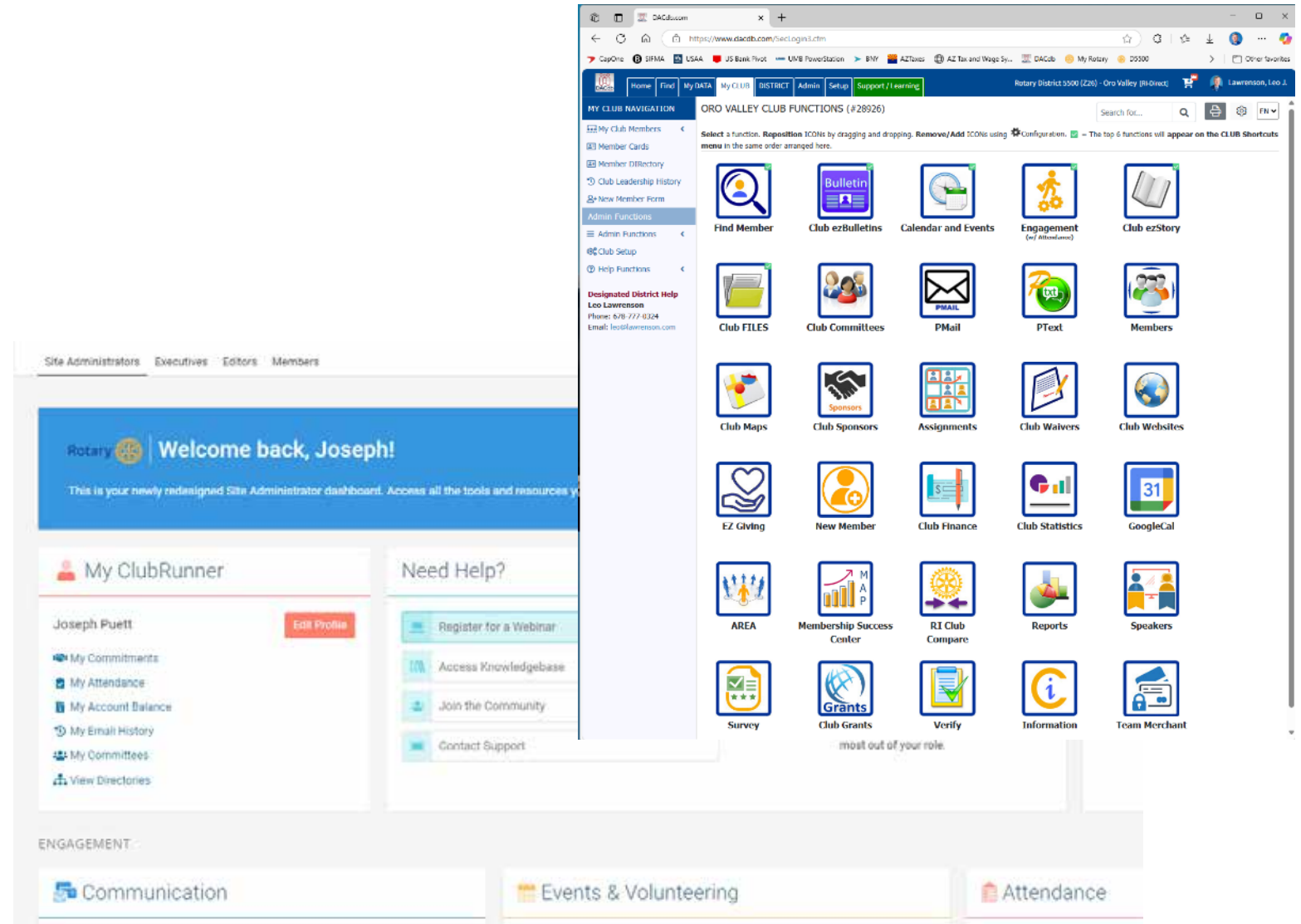


# MORE THINGS TO THINK ABOUT

- What are your club's goals and how well are you meeting them?
- Who covers for you when you can't be there?
- What information do you put in the minutes?
- How do you convince someone else to become secretary?
- How do you transition with the new secretary?

# TOOLS FOR THE CLUB SECRETARY – DACdB/ClubRunner

- Add a Club Member
- Manage Club Members
- Manage Club Officers
- Update Club details
- Attendance
- Email Correspondence



# TOOLS FOR THE CLUB SECRETARY – My Rotary

- LAST RESORT!

- Add a Club Member
- Manage Club Members
- Manage Club Officers
- Update Club Details

Rotary

My Rotary

Donate

Join

HOME

EXCHANGE IDEAS

TAKE ACTION

LEARNING & REFERENCE

MANAGE

THE ROTARY FOUNDATION

NEWS & MEDIA

MEMBER CENTER

Sierra Vista

Rotary Club

Club details

Members

Finance

Reports

Goals

If you have questions about your club membership, please contact [Data Services](#)

[Add a member](#)

[Manage club officers](#)

[Download member list](#)

Search club members

Search by name

Search by email address

SEARCH

CLUB MEMBERS (60)

Role

Member status

Larry C Angove

ID: 11726978

Member

2023 - Present

larrya.janec@gmail.com

+1 541-404-5194

Ty Baze

Member

ty.baze@usw.salvationarmy.org



# TOOLS FOR THE CLUB SECRETARY – My Rotary/Club Central

- Set/Update Club Goals

The screenshot shows the 'Club Goals' page in the Rotary Club Central interface. The left sidebar contains navigation links: Club Goals, Global Summary, Trends, Service Projects, Resources, Reports, Club Ratings, and Contact Us. The main content area is titled 'Club Goals' and includes instructions on how to set and track goals. Below this, there's a section for 'Rotary Club of Oro Valley' for the year '2024-25'. A progress bar indicates '17 goals achieved of 23 selected'. A list of goals is displayed, with the 'Priority Goals' section highlighted by a red circle. The goals listed are: Club membership, Strategic plan, Service participation, Annual Fund contributions, PolioPlus Fund contributions, and Benefactors. Each goal shows its achievement status and progress.

Goal	Priority	Achievement	Goal
Club membership	Priority	33 of 32	32
Strategic plan	Priority	100%	100%
Service participation	Priority	25 of 28	28
Annual Fund contributions	Priority	4,290 of 4,000	4,000
PolioPlus Fund contributions	Priority	7,325 of 500	500
Benefactors	Priority	1 of 1	1

# TOOLS FOR THE CLUB SECRETARY – My Rotary/Club Central

- Set/Update Club Goals

Rotary Club Central

My Rotary English Leo Lawton

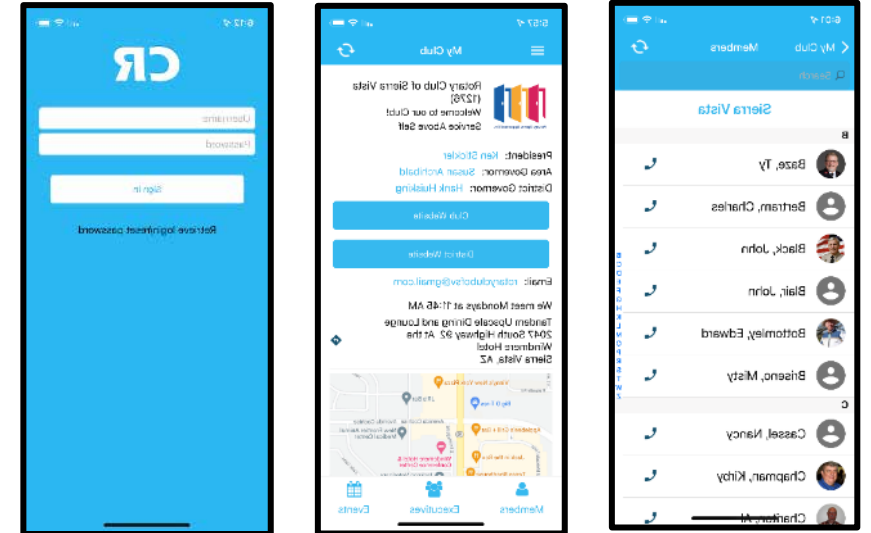
2024-25 One Year Goals

**Club Goals** Other Goals

Social activities	ACHIEVEMENT	GOAL
➤ Show goal details and history	28	30
Service projects	ACHIEVEMENT	GOAL
➤ Show goal details and history	1 As of 8 May 25	15
New member sponsorship	ACHIEVEMENT	GOAL
➤ Show goal details and history	7	2
Online presence	ACHIEVEMENT	GOAL
➤ Show goal details and history	<input checked="" type="checkbox"/>	
Rotary Action Group participation	ACHIEVEMENT	GOAL
➤ Show goal details and history	4	5
Update website and social media	ACHIEVEMENT	GOAL
➤ Show goal details and history	28	4
Leadership development participation	ACHIEVEMENT	GOAL
➤ Show goal details and history	3	3
Bequest Society members	ACHIEVEMENT	GOAL
➤ Show goal details and history	0 As of 8 May 25	5
Interact clubs	ACHIEVEMENT	GOAL
➤ Show goal details and history	0 As of 8 May 25	1
Review and consider updating your club bylaws	ACHIEVEMENT	GOAL
➤ Show goal details and history	<input checked="" type="checkbox"/>	
District conference attendance	ACHIEVEMENT	GOAL
➤ Show goal details and history	8	7

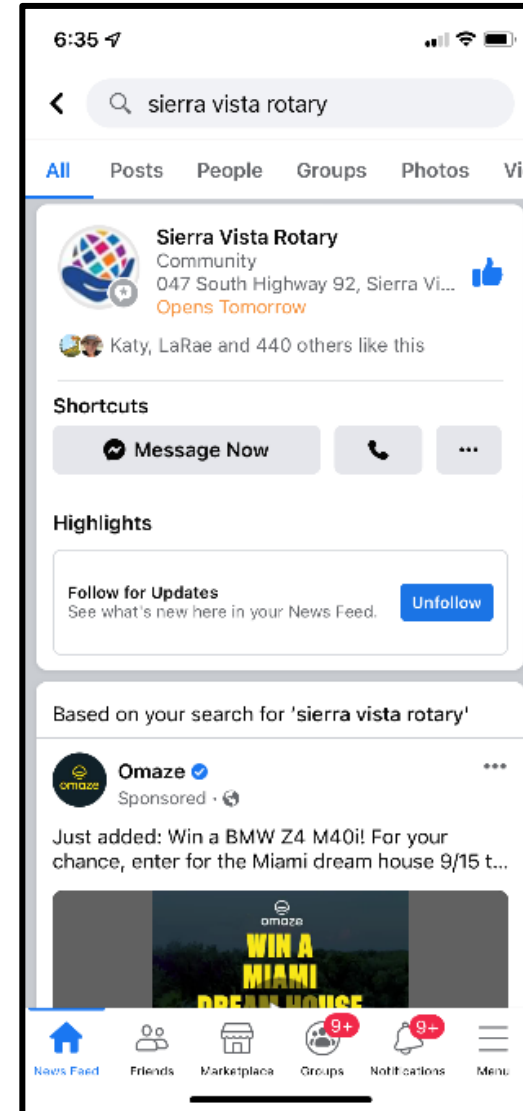
# OTHER DIGITAL TOOLS

- ClubRunner Mobile App/DACdb IGNITE



# OTHER DIGITAL TOOLS

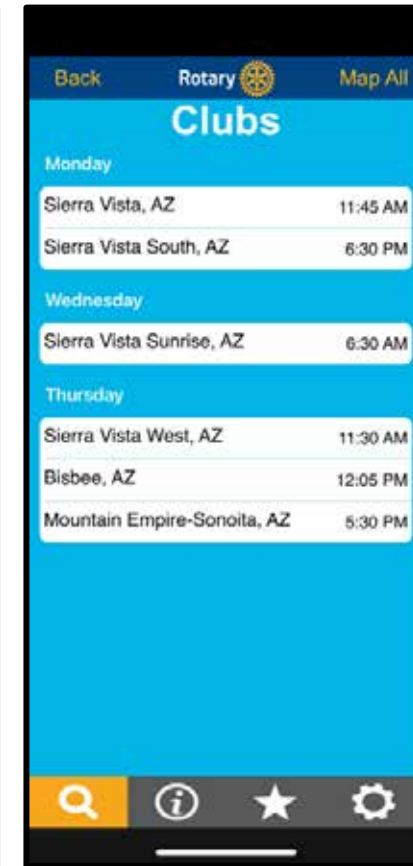
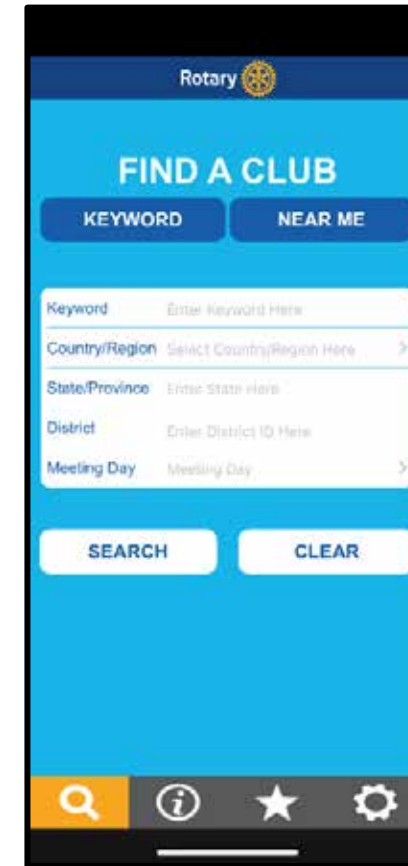
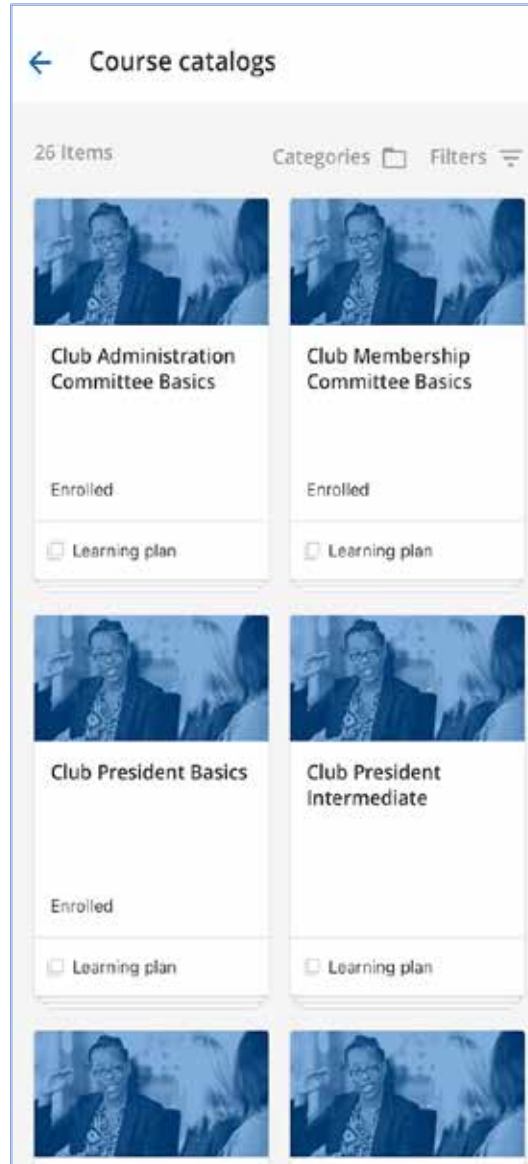
- ClubRunner Mobile App/DACdb IGNITE
- Facebook





# OTHER DIGITAL TOOLS

- ClubRunner Mobile App/DACdb IGNITE
- Facebook
- Rotary Club Locator App
- Rotary Learning Center App



# RESOURCES - RUSSELL HAMPTON (Club Supplies)

- Order Badges
- Pins
- New Member Packets
- Plaques

The screenshot shows the homepage of the Russell Hampton Company website. At the top, there is a navigation bar with contact information (800-877-8908), a login/register link, and a quick view option. The main header features the company logo, a centennial celebration banner (1920-2020), and a grid of product categories including Awards & Plaques, Lapel Pins, Club Supplies, New Member Packets, Traditional Round, Engraved Plaque, Credit Card Style, Guest Speaker, Trading Banners, and Club Signs. Below this is a search bar and a navigation menu. The main content area highlights the company's status as 'Rotary's Original Club Supplies Vendor - Since 1920' and features a section for the '2023-2024 Rotary Theme' with various items like the Daniel Farnandes District Governor packet and the 'We Do That!' logo. Another section titled 'Our Featured Items' displays a Vocational Service pin, a Vocational Service medallion, and a USB drive. The bottom of the page features a grid of promotional tiles for 'We do that!', 'Welcome to Rotary', 'Featured Products', 'Closeout Deals', 'What's New', 'Awards & Plaques', 'Banners & Flags', and 'Badges'.

# RESOURCES (straight from My Rotary)

## Secretary

As club secretary you help your club run smoothly and effectively. You also monitor club trends to help identify strengths and areas for improvement, and share this information with club and district leaders.

### What you do

- Maintain membership records: [Update your club membership data](#). Your club invoice is based on the number of members in Rotary's database for your club as of 1 July and 1 January. Rotary International sends the club invoice by email and mail. Save paper by [opting out](#) of the paper (mailed) version.
- Maintain minutes of club, board, and committee meetings
- Work with incoming secretary to ensure smooth transition

### How to prepare

- Take online courses for club secretary in the [Learning Center](#)
- Attend district training assembly
- Work with outgoing secretary

### Resources & reference

- [Be a Vibrant Club: Your Club Leadership Plan](#)
- [Standard Rotary Club Constitution](#)
- [Recommended Rotary Club Bylaws](#)

### Tools

- [Pay or view your club invoice](#) (Rotary International dues and fees)
- [Update your club membership data](#)
- Set and track goals in [Rotary Club Central](#)
- Check our [discussion group](#) for club secretaries

### Rotary support

- Outgoing secretary
- Club and district leaders
- Club and District Support representative
- Financial representative

# RESOURCES – Learning Center: Club Secretary Basics

## 10 Recommended Courses: 4h Avg Time

- Getting Started with the Learning Center
- Get Ready: Club Secretary
- Managing Club Business
- Working with Your Club Leadership Team
- Minimizing Risk
- Rotary Club Central Resources
- Online Membership Leads
- Protecting Personal Data
- Preventing and Addressing Harassment
- Rotary's Action Plan and You





# RESOURCES – DACdb/ClubRunner Learning Center, Webinars & Videos

Help Center > Learning Center Files > Overview

## Overview

DACdb Home Page  
Ken Dresser · Published: Sep 16, 2021

Reset A Password  
Ken Dresser · Published: Sep 16, 2021

Edit User Login Credentials  
Ken Dresser · Published: Sep 16, 2021

New Member Quick Start Guide  
Ken Dresser · Published: Sep 17, 2021

DACdb Access from Abroad  
Ken Dresser · Published: Sep 16, 2021

New User Interface (UI) Overview  
Rachelle Langley · Published: Dec 6, 2021

Change Language  
Ken Dresser · Published: Sep 16, 2021

Club Officer Quick Start Guide  
Ken Dresser · Published: Oct 18, 2021

New UI Customizable Icon Pages  
Rachelle Langley · Published: Dec 6, 2021

Calendar Series Part IV  
Lin Kelly · Published: Dec 23, 2021

New Member Getting Started Printable Booklet

Help Center > Learning Center Files > Club Support > Club Members

## Club Members

Add a Member  
Michael L. Soden · Published: Jul 24, 2021

Edit a Member  
Lin Kelly · Published: Jul 25, 2021

Edit Your Email Address  
Lin Kelly · Published: Jul 26, 2021

Edit Your Phone Number  
Lin Kelly · Published: Jul 26, 2021

Delete a Duplicate Member  
Lin Kelly · Published: Jul 26, 2021

Change a Proposed Member to Active  
Lin Kelly · Published: Jul 26, 2021

Download Member Record to Outlook Address Book  
Lin Kelly · Published: Jul 26, 2021

Opt-Out or In to Pmail Communications  
Lin Kelly · Published: Jul 26, 2021

Transferring a Member  
Lin Kelly · Published: Jul 26, 2021

New Member Form  
Lin Kelly · Published: Jul 26, 2021

New Member Form - Video  
Lin Kelly · Published: Jul 26, 2021

Edit Member Profile  
Lin Kelly · Published: Jul 26, 2021

Member's Photo is Sideways  
Lin Kelly · Published: Jul 26, 2021

Corporate Member

5:00 - 6:00PM EDT (60 min) | Club Secretaries | View Recording >

## Attendance

Hosted by Omar | Co-host: Syreena

This webinar covers the Attendance module on the club version. Topics include:

- Setting up your club's attendance rules per membership type
- Setting up excused members and leaves of absence
- Setting up make up eligibility windows
- Tracking and managing member and guest attendance
- Adding and managing banked makeups
- Reporting monthly attendance statistics to District
- Generating attendance reports and viewing analytics
- Overview of the Barcode Scanner module

4:00 - 5:00PM EDT (60 min) | Beginner | Club Presidents | Club Secretaries | Club Administrators

## Membership Management

Hosted by Michael | Co-host: Stephen

This webinar covers managing your members on the club version. Topics include:

- Review of membership types and statuses
- Managing non-member contacts
- Adding, transferring and terminating members
- Updating club information
- Managing committees and sub-committees
- Managing public and private documents
- Overview of reports and member data download
- Brief introduction to RI integration

7:00 - 8:30PM EDT (90 min) | Advanced | Club Presidents | Club Secretaries | Club Administrators

## Membership Management & RI Integration

Hosted by Zach | Co-host: Robin

This webinar covers membership on the club version, with a focus on RI Integration. Topics include:

- Managing member and club information
- Setting up custom fields
- Creating custom membership types
- GDPR pseudo-anonymization process
- Managing member activity and engagement reports
- Managing RI Integration settings
- Reviewing the member & club integration archive
- Using compare & synchronize for members and club information
- Using executive compare & synchronize
- Rotaract membership



# SUMMARY AND QUESTIONS

- Club Secretary Duties
- Preparing to Be a Club Secretary
  - Things to Think About
- Tools for the Club Secretary
  - DACdb/ClubRunner/My Rotary and Other Digital Tools
  - Additional Club Secretary Resources



# SUMMARY AND QUESTIONS

- Questions?
- Sharing?

THANK YOU!

My Contact Info:

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