**January-June:  Prepare for your office**

* [Create a My Rotary account](https://my.rotary.org/document/how-create-my-rotary-account) if you don’t have one. Subscribe to Rotary newsletters that support club activities.
* Join the Club Secretaries [discussion group](https://my.rotary.org/en/exchange-ideas/groups/club-secretaries) on My Rotary.
* Become familiar with the [Rotary Code of Policies](https://my.rotary.org/en/document/rotary-code-policies), [Standard Rotary Club Constitution](https://my.rotary.org/en/document/standard-rotary-club-constitution), the [Recommended Rotary Club Bylaws](https://my.rotary.org/en/document/recommended-rotary-club-bylaws), and your club’s constitution and bylaws.
* Review the discussion questions for the district training assembly (see the section on district training assembly discussion questions section in the Get Ready: Club Secretary module).
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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 to your club
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Meet with the outgoing secretary to:

* + Review  club procedures, including attendance
	+ Review the club invoice
	+ Discuss how the outgoing leadership team managed membership leads
	+ Get access to the club’s records, property, and archive
* Review the current Manual of Procedure.
* Participate in your district training assembly.
* Attend meetings of your incoming board of directors and current board meetings, if invited.
* Participate in the club assembly held by the president-elect after the district training assembly to discuss club plans for the coming Rotary year
* Prepare a schedule for sending statements of club dues and fees to all members (monthly, quarterly, or semiannually), and plan how you will record the dues and fees you receive.

**July:  Take office**

* Give your treasurer the club invoices for Rotary International and District 6510, so they can be paid on time.
* Update your club information, maintain membership records (learn how to [add](https://my.rotary.org/en/document/how-add-member), [edit](https://my.rotary.org/en/document/how-edit-member-information), and [remove](https://my.rotary.org/en/document/how-remove-member) a club member and [update club data](http://www.rotary.org/myrotary/en/document/how-update-club-data)), and view reports on My Rotary. If you use DACDB, make sure your club information is being sent to Rotary correctly with RI Compare.
* Make sure new club officers are reported in My Rotary (learn how to [add an officer](https://my.rotary.org/en/document/how-add-club-officer)) so they have access to online tools and resources. Ensure you are copied on all District Communications to your club, and that you are working closely with the Club President in all functions.

**December**

* Support the annual meeting to elect club officers.
* Confirm that your club’s membership data is current in My Rotary so you receive an accurate club invoice in January. If you use a DACDB, make sure your club information is being sent to Rotary.
* Prepare the midyear progress report.

**January**

* Review the club’s schedule of activities with the president and the board of directors.
* Report incoming club officers by 1 February on My Rotary or through DACDB or email their names and contact information to data@rotary.org.
* Coordinate with the club treasurer to ensure that the club invoices are paid on time to Rotary International and District 6510.

**February**

* If your club wants to propose a member to be a governor-nominee candidate, send the resolution supporting the decision and the [district governor-nominee form](https://www.rotary.org/myrotary/en/document/district-governor-nominee-form)to the district nominating committee.

**April**

* Begin briefing next year’s secretary.
* Prepare credentials for delegates to the Rotary convention (See the Manual of Procedure section Article 10.050).

**June**

* Confirm that your club’s membership data is current in My Rotary, so you receive an accurate club invoice in July. If you use DACDB, make sure your club information is being sent to Rotary.
* Prepare your annual report to the club.
* Give the club’s records, materials, and archives to the incoming secretary.