

**Welcome to the
District 3330 Training Assembly
Club President-Elected
Secretary
Treasurer
Club Administration**



Session 1: Responsibility 45 Min.



Club Secretary Responsibilities



Responsibilities

- Attend the district training assembly and the district conference
- Meet with the outgoing secretary and receive club records
- Meet with the incoming board of directors
- Create a My Rotary account on [Rotary.org](https://www.rotary.org) if you don't already have one



Responsibilities

- Update your club's records and member list on My Rotary as changes occur
- Give the club treasurer the club invoices, due in January and July
- Serve on the club board and club administration committee
- Take minutes at club and board meetings and club assemblies



Responsibilities

- Update club and officer information for the Official Directory and Rotary's records
- Manage club correspondence, responding to email and sending official notices and invitations
- Keep promotional items, name badges, and other materials used at meetings and events



Responsibilities

- Take attendance and submit monthly attendance reports to the district governor
- Preserve your club's historical records
- Write an annual report at the end of the Rotary year
- Assist the club president, treasurer, and committees as needed
- Meet with your successor and hand over club records



Club Treasurer Responsibilities



Responsibilities

- Attend the district training assembly and the district conference
- Maintain accurate club financial records
- Collect dues and use them to pay fees
- Keep historical financial records in accordance with local document retention laws



Responsibilities

- Manage club and project funds, including paying bills and other expenses and distributing grant and scholarship funds
- Work with The Rotary Foundation to make contributions and manage grants
- Make sure that the club follows its budget



Responsibilities

- Develop a budget for next year
- Give monthly reports to your club's board
- Provide regular financial updates during club and board meetings
- Plan next year's budget and get it approved by the last quarter of the Rotary year



Responsibilities

- Hand all records over to the incoming treasurer and help him or her transition into the role
- Write and present a detailed annual report at the end of the Rotary year



Responsibilities

- Have your club's financial activity reviewed by a qualified accountant who is not affiliated with your club at the end of the year
- File your club's taxes, if required to do so by local or national tax code



Club Committee Responsibilities



Responsibilities

- Attend your district training assembly
- Working with the president-elect, select and prepare your committee members
- Create subcommittees as needed (for example, club meeting planning, club newsletter and website, social events, attendance)



Responsibilities

- Meet regularly and plan activities
- Set committee goals to help achieve the club's goals for the year and monitor progress toward them
- Manage your committee's budget
- Work with your club's other committees and your district committee on multiclub activities or initiatives



Responsibilities

- Report committee activities and progress to the club president, board of directors, and the full club
- Determine what else your club expects your committee to do



Club Administration Committee Responsibilities



Responsibilities

- Plan your club's meetings, assemblies, and other activities
- Send member communications
- Facilitate connections among club members
- Take attendance
- Maintain the club website and social media sites



Resources

- [Lead Your Club: President - Club President's Manual](#)
- [Be a Vibrant Club: Your Club Leadership Plan](#)
- [Standard Rotary Club Constitution](#)
- [Recommended Rotary Club Bylaws](#)



Resources

- [Lead Your Club: Treasurer](#)
- [Budget Worksheet](#)
- [Lead Your Club: Secretary](#)
- [Lead Your Club: Administration Committee](#)
- [Club committee structure](#)

