

Appendix 2: Discussion Questions for the District Assembly

Reviewing this manual before you attend the district assembly will help you prepare for your training, which will include facilitated discussion sessions that address the questions below. When considering the questions, refer to this manual and compare thoughts with other incoming club leaders.

What are the main responsibilities of the secretary in your club?

How will you work with the club president?

How will you work with the treasurer?

How can you support your club's committees?

What administrative duties can you streamline?

What is one annual goal you will work toward in the coming year? How does this support your club's strategic plan?

Worksheet 1: Responsibilities

Take five minutes to individually complete the chart below. Take five more minutes to compare your answers with your neighbors' answers.

Club secretary responsibility	How often performed?	Others involved	Strategy
Maintain membership records			
Record attendance at meetings and send monthly attendance reports to the district governor			
Send reminders for club, board, and committee meetings			
Record and maintain minutes of meetings			
Submit required reports, such as the semiannual report, to Rotary International			
Work with your club treasurer to collect and submit membership dues and magazine subscriptions to RI			
Other:			
Other:			

Worksheet 3: Goals

Use this worksheet to draft a long-range goal and annual goals for three years to reach the long-range goal. Ensure that your goals are:

Shared. Those who participate in setting a goal and developing strategies to achieve that goal are committed to implementing it.

Measurable. A goal should provide a tangible point to pursue.

Challenging. A goal should be ambitious enough to go beyond what your club has accomplished in the past.

Achievable. Rotarians should be able to accomplish the goal with the resources available.

Time specific. A goal should have a deadline or timeline.

Long-range goal (goal for your club three years from now)

Year 1 annual goal:

Year 2 annual goal:

Year 3 annual goal:

Worksheet 4: Action Plan

In the space below, write one annual goal from your goals worksheet. Then, determine the action steps that need to be taken to meet this goal.

Annual goal

Action step	Who will be responsible?	How long will this step take?	How will progress be measured?	What resources are available?
1.				
2.				
3.				
4.				
5.				

Resources needed

Worksheet 5: Club Secretary Case Studies

Read each case study below and answer the questions. Create a plan using the case study action plan worksheet on page 33.

You are new to the position and the former secretary has given you three boxes full of club records and files. You want to move all files to be electronic.

How do you go about doing this?

How will you convince club members of the benefits of switching to electronic files only?

You also want to encourage members to use RI's online system, Member Access. How will you do so?

The Rotary Club of Carson has traditionally been a small club. One member has handled the responsibilities of the secretary and treasurer positions for several years. However, this member recently left the club due to health issues. Your club is rarely open to change, but you have a lot of innovative ideas you would like to see implemented. You have shared these ideas with your club president-elect and several other members. The club president-elect is skeptical, but the club members are excited.

How will you convince your club president-elect to give your ideas a chance?

How could these changes affect the dynamics of your club?

You have attended several board meetings and have noticed that little is accomplished at each meeting. You have organized the agenda, but it is never followed. You are frustrated that your time is not being used well and worry that club members would be upset if they knew what was going on at the board meetings.

As club secretary, how can you get the board back on track?

Your club is very busy and involved in many activities. Your club also has a number of club committees working on a variety of initiatives. As you talk with several committee members about upcoming event dates, you realize that the committees are not communicating with each other. Several events are being scheduled for the same date. You realize that club members are confused by the disorganization.

What do you do?

How can you encourage the club committee chairs to communicate with one another?

Case Study Action Plan

Action step	Who will be responsible?	How long will this step take?	How will progress be measured?	What resources are available?
1.				
2.				
3.				
4.				
5.				

What did you learn that you can apply to your club?

Worksheet 6: Problem-solving Guide

Use the Planning Guide for Effective Rotary Clubs and the goals worksheet from session 2 to develop your problem-solving guide. Analyze your club's goals, and think about potential challenges to achieving them. Then, offer solutions to these challenges.

	Goal	Potential Challenge	What resources are available?
Administration			
Membership			
Public Relations			
Service Projects			
Rotary Foundation			
Other			