

Secretary Calendar/Checklist



The following calendar/checklist shows by month the activities and events you should be addressing. You may use the blank lines to add items.

June

Before taking office in July, you should:

- Attend district-sponsored club officer training program
- Meet with outgoing executive committee and obtain files from outgoing secretary
- Confirm outgoing secretary submitted list of newly elected officers to World Headquarters and district governor
- Meet with executive committee to complete Club Success Plan
- Work with executive committee to develop club budget
- Review TI Catalog and order materials
- Obtain secretary handbook from incoming president and read it
- _____
- _____

July

- Attend district-sponsored club officer training program if you didn't attend in June
- Attend and take minutes at executive committee meeting
- Attend and take minutes and attendance at club meeting
- Prepare and mail club correspondence
- Order club supplies online, or prepare and mail club orders to World Headquarters
- Update club membership roster
- _____
- _____

August

- Attend district-sponsored club officer training program if you didn't attend in June or July
- Attend and take minutes at executive committee meeting
- Attend and take minutes and attendance at club meeting
- Work with president, vice president membership, and treasurer to collect semiannual dues and update membership report
- Prepare and mail club correspondence
- Order club supplies online, or prepare and mail club orders to World Headquarters
- Update club membership roster
- _____
- _____

September

- Attend and take minutes at executive committee meeting
- Attend and take minutes and attendance at club meeting
- Work with president, vice president membership, and treasurer to collect dues and submit payment. Dues must be at World Headquarters by October 1
- Prepare and mail club correspondence
- Order club supplies online, or prepare and mail club orders to World Headquarters
- Update club membership roster
- _____
- _____

October

- Attend and take minutes at executive committee meeting
- Attend and take minutes and attendance at club meeting
- Ensure dues renewals are at World Headquarters by October 1
- Prepare and mail club correspondence
- Order club supplies online, or prepare and mail club orders to World Headquarters
- Update club membership roster
- _____
- _____

November

- Attend and take minutes at executive committee meeting
- Attend and take minutes and attendance at club meeting
- Prepare and mail club correspondence
- Order club supplies online, or prepare and mail club orders to World Headquarters
- Update club membership roster
- If club elects semiannually, prepare to give files and handbook to incoming secretary
- _____
- _____

December

- Attend district-sponsored club officer training
- Attend and take minutes at executive committee meeting
- Attend and take minutes and attendance at club meeting
- Prepare and mail club correspondence
- Order club supplies online, or prepare and mail club orders to World Headquarters
- Update club membership roster

If the club elects semiannually, the incoming secretary should:

- Attend district-sponsored club officer training program

- Provide list of newly elected officers to World Headquarters and to district governor. The information must be at World Headquarters by December 31 for Distinguished Club Program credit
- Give files and handbook to incoming secretary
- Meet with incoming executive committee to develop club budget
- Read secretary handbook
- _____
- _____

January

- Attend district-sponsored club officer training program if you didn't in December
- Attend and take minutes at executive committee meeting
- Attend and take minutes and attendance at club meeting
- Prepare and mail club correspondence
- Order club supplies online, or prepare and mail club orders to World Headquarters
- Update club membership roster
- _____
- _____

February

- Attend district-sponsored club officer training program if you didn't attend in December or January
- Attend and take minutes at executive committee meeting
- Attend and take minutes and attendance at club meeting
- Prepare and mail club correspondence
- Order club supplies online, or prepare and mail club orders to World Headquarters
- Update club membership roster
- _____
- _____

March

- Attend and take minutes at executive committee meeting
- Attend and take minutes and attendance at club meeting
- Work with president, vice president membership, and treasurer to collect dues and prepare dues submission. Dues must be at World Headquarters by April 1
- Prepare and mail club correspondence
- Order club supplies online, or prepare and mail club orders to World Headquarters
- Update club membership roster
- _____
- _____

April

- Attend and take minutes at executive committee meeting
- Attend and take minutes and attendance at club meeting
- Submit dues renewal invoice and dues. World Headquarters must receive it by April 1
- Prepare and mail club correspondence
- Order club supplies online, or prepare and mail club orders to World Headquarters
- Update club membership roster
- _____
- _____

May

- Attend and take minutes at executive committee meeting
- Attend and take minutes and attendance at club meeting
- Prepare and mail club correspondence
- Order club supplies online, or prepare and mail club orders to World Headquarters
- Update club membership roster
- Prepare to give secretarial files to newly elected secretary
- _____
- _____

June

- Attend and take minutes at executive committee meeting
- Attend and take minutes and attendance at club meeting
- Prepare and mail club correspondence
- Order club supplies online, or prepare and mail club orders to World Headquarters
- Update club membership roster
- Provide list of newly elected officers to World Headquarters and to district governor. The information must be at World Headquarters by June 30 for Distinguished Club Program credit
- Meet with incoming executive committee and give files to newly elected secretary. Help prepare new secretary for office
- _____
- _____