



Club Secretary Handoff Checklist

By first week in June

Activity	Outgoing Secretary	Incoming Secretary
Have a working login for RI Member Access (a User Name & Password that works)		<input type="checkbox"/>
Have used outgoing Secretary's RI Member Access login to visit and explore the "Update Membership Data" section of RI Member Access		<input type="checkbox"/>
Have verified that incoming President and Secretary are identified in RI Member Access "Update Club Data" (these change automatically on July 1) (<i>should have been done in January for RI Directory</i>)	<input type="checkbox"/>	<input type="checkbox"/>
Have verified that incoming club officers are identified in District Website (president-elect, Secretary-elect, treasurer-elect) (these will change automatically on July 1)	<input type="checkbox"/>	<input type="checkbox"/>
Retrieved and saved most recent Club Recognition Summary (CRS) & Monthly Contribution Report (MCR) reports from Member Access and emailed to Club President and Foundation Chair	<input type="checkbox"/>	
All membership information available and ready to file Semi-Annual Report	<input type="checkbox"/>	
Have a working login for the District Database (a User Name & Password that works)		<input type="checkbox"/>
Have successfully updated my own member profile in the District Database		<input type="checkbox"/>
Know how to add a member to the RI Database, retrieve the RI Member Number, and then add the member to the District Database		<input type="checkbox"/>
Know how to take meeting attendance in the District Database		<input type="checkbox"/>
Know how to take meeting attendance offline from the District Database and then upload		<input type="checkbox"/>
Know how to report attendance (monthly) in the District Database		<input type="checkbox"/>
Copied any club-related electronic files (documents, etc.) to a CD or Flash Drive and passed on to incoming Secretary	<input type="checkbox"/>	
Have a computer with a high speed connection at home or the office to do club work – have loaded all club-related electronic documents received from outgoing Secretary		<input type="checkbox"/>
Have a copy of the Club Secretary's Manual, available from District or RI Websites: http://www.rotary.org/RIdocuments/en_pdf/229en.pdf		<input type="checkbox"/>

First week in July

Activity	Outgoing Secretary	Incoming Secretary
Have reported the club's June attendance in the District Database	<input type="checkbox"/>	
Ready to take attendance for first July meeting in the District Database		<input type="checkbox"/>