



CLUB SECRETARY: CASE STUDIES

RTN GAUTAM SHRESTHA, ROTARY CLUB OF YALA

CHAIR, GML & PUBLICATION 2024-25

CO-CHAIR, INFORMATION & TECHNOLOGY 2024-25

ASSISTANT GOVERNOR 2025-26

MEMBER, DISTRICT LEARNING FACILITATOR 2025-26



LEARNING OBJECTIVES

As the secretary, you might encounter challenges. This session will allow you to practice problem-solving and conflict-resolution skills.

- **IDENTIFY CHALLENGES**
- Practice Strategies for **PROBLEM-SOLVING**



Organizational
Backbone



Communicator &
Connector



Record Keeper
& Compliance
Officer



Strong Organizational
Skills



Tech-Savvy



CASE STUDIES

Five case study scenarios are presented below, outlining situations you may encounter after being appointed as Secretary for the 2025-26 term. For each scenario, identify the

CHALLENGES, ACTION TAKEN & OUTCOMES.



CASE STUDY #1: UPDATING MEMBERSHIP & CLUB DATA (MY ROTARY)

Your club has **not updated its membership** list in the past year, resulting in inaccurate RI data on My Rotary. New members have not been registered, and former members have not been removed. Consequently, the club's latest invoice shows **RI dues being charged for inactive members** while failing to include dues for new members. Additionally, you are **not yet familiar** with using My Rotary.



CHALLENGES IDENTIFIED

Outdated
Membership Records

Incorrect RI Dues
Billing

Limited Technical
Knowledge



ACTION TAKEN

Immediate Review of
Membership Records

Seek Assistance &
Training

Update My Rotary
Records

Communicate with
Club Leadership



OUTCOME

Accurate RI Records

Correct Billing

Improved Efficiency

Smooth RI Convention
Registration



CASE STUDY #2: LACK OF CLUB GOALS & ENGAGEMENT IN ROTARY SYSTEMS

Your club president **isn't setting goals for the club** in Rotary Club Central and has not given you and other club leaders guidance on **what should be achieved**. There seems to be **no clear plan** for the year and **no Rotarians are registered in My Rotary**, and there has been **zero participation** in the My Rotary Learning Center.



CHALLENGES IDENTIFIED

No Clear Club Goals
Low Engagement in My Rotary
Lack of Leadership Guidance
Missed RI Recognition



ACTION TAKEN

Initiate Goal
Register Members in My Rotary
Promote My Rotary Learning Center
Take Temporary Leadership Role
Follow Up with Rotary Support



OUTCOME

Clear Club Goals
Active My Rotary Usage
Improved Leadership Coordination
Eligibility for RI Recognition
Sustainable Engagement



CASE STUDY #3: STRENGTHENING DOCUMENTATION AND MEETING MINUTES

Despite strong member participation, your club struggles with persistent administrative challenges, particularly in **documentation and meeting minutes**. These inefficiencies have impacted the club's overall **productivity and progress** toward Rotary's key objectives. Because of documentation and Minutes, your club **delays submitting mandatory reports**, including monthly club activity report to AG/DS, activity reports for the GML and documentation for awards and recognition, to the Rotary District.



CHALLENGES IDENTIFIED

Inconsistent Documentation
Lack of Standard Process
Delayed/Missed Reporting



ACTION TAKEN

Develop a Standardized Template
Assign a Dedicated Minute-Taker
Centralize Documentation
Assign Report Responsibilities
Communicate with District Leaders



OUTCOME

Clear & Consistent Records
Usage Improved
Accountability
Efficient Follow-Ups
Club Recognition
Stronger District Relations



CASE STUDY #4: IMPROVING COMMITTEE COORDINATION TO PREVENT SCHEDULING CONFLICTS

Your club has a lot of **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 scheduled for the same date**. You believe that this disorganization is **hurting the club**.



CHALLENGES IDENTIFIED

Lack of Committee Communication

Member Frustration and Wasted Resources

Scheduling Conflicts

Organizational Reputation Risk



ACTION TAKEN

Create a Monthly Calendar

Hold Regular Committee Chair Meetings

Implement a Proposal System

Centralize Communication



OUTCOME

No More Conflicts

Stronger Collaboration

Increased Member Satisfaction

Cost Savings

Enhanced Club Image



CASE STUDY #5: ENHANCING EFFICIENCY AND ACCOUNTABILITY THROUGH THE RID₃₂₉₂ WEB PORTAL

AG/DS requested your club to submit monthly report in RID3292 web portal (www.rotarydistrict3292.org.np) platform. This web portal consist of two core features: Member Directory Management and Monthly Reporting System and you are not aware of this portal.



CHALLENGES IDENTIFIED

Lack of Awareness

Mandatory Reporting Requirement

Technical Adaptation

Time Constraints



ACTION TAKEN

Immediate Orientation

Club Collaboration

Structured Reporting Process



OUTCOME

Timely Compliance

Improved Record-Keeping

Enhanced Efficiency

Knowledge Sharing





THANK YOU!

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