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## Snippet #184 The Role of the Secretary

Two of the officer roles in associations parallel professions that exist throughout our society: the secretary (or clerk) and the treasurer (or financial manager). For this reason, the role of the secretary in the world of associations can become confusing. There are even some who claim that these association roles are obsolete and that having a paid staff means there's no reason for a member to have those titles. But nothing could be further from the truth.

The duties of the secretary may change depending on the size and scope of the organization, and if the secretary is not actually performing the tasks, might be considered more an oversight secretary than a practicing secretary. While tasks can be delegated, the responsibility remains. For example, the secretary is responsible for the integrity of the association's records, such as minutes of meetings and governance documents. All records must be accurate and current. The secretary is the board member who is held responsible *by the members* who elected that person to monitor and oversee the association's official documentation. Often the secretary is the official signatory on bank records or government-required resolutions, attesting that permission was granted or that the board officially took a certain action.

The secretary needs to be aware of all notice requirements because it falls to the secretary to ensure official notices are sent in accordance with the bylaws. If those notices are not properly given, any action taken is null and void, so this is a huge responsibility. Although the secretary may not physically send out notices because this task is delegated to paid staff, the secretary retains the responsibility to see that the proper notices are sent. It is the secretary, not the staff member, who is accountable to the membership.

According to Robert's Rules, the secretary puts together the agenda. However, the general focus of Robert's Rules is on smaller local associations and does not make a distinction for larger associations with professional staffs. Planning an agenda is often a collaborative endeavor between the president and secretary. It's important to remember that this is a meeting of the board or members, under the authority of the elected leaders, and they should be the most active participants in agenda development, with paid staff as a valued collaborator but not the primary driver.

During the meeting, the secretary calls the roll and informs the president whether there is a quorum. The secretary must have a copy of the bylaws and all other policies and rules at every meeting and provide any updates on board actions taken at prior meetings. The secretary must ensure that every action taken by the board is clearly stated for the official record. Some secretaries use motion forms filled out by the maker to ensure accuracy. An LCD projector during a meeting is an invaluable asset to keep everyone on track and, once the vote is taken, provides the text to be inserted into the minutes.

The secretary may not produce the minutes for the meeting, but is responsible for their accuracy, even if being assisted by professional staff. Notifications (such as committee appointments) are generally made by the secretary as a report of official action.

The role of the secretary is so important that in a secretary's absence, a secretary pro tem must be appointed to serve for that meeting.