

How To Serve As Route Secretary (677)

The Route Secretary fills a very important role in your route. The route's effective functioning as an organisation is only possible if the Secretary ensures that the Route Forum's administrative and information systems functions well.

This Guide covers the Secretary's responsibilities. It is essential for the route Secretary to familiarise himself or herself with this Guide so that he or she can fill the position as an effective leader. The Guide is also good reading for other route leaders and members, since it will give them a good understanding of what the Secretary's role should be and what support they could be offering the route Secretary.

This Guide should be read together with other Guides covering the various leadership positions. You may also be interested in the [Resource: Template Voluntary Association constitution](#).

Why is the role of Secretary important?

It is important that best possible candidate is appointed to the role of Secretary and that the appointed person is a good administrator.

The Secretary's role is mainly to ensure that the route's administrative systems and communication channels are working well. It is also important that the Secretary understands the rules set by the route's founding documents and the legal requirements, since they may apply to the route's functioning.

As a leader serving on the Route Forum, the Secretary should, along with the other Route Forum members, provide the

leadership needed for the route to grow and function effectively. This does not imply that the route can not rely on the Open Africa head office to offer help! But it does imply that the route's leaders, and specifically the Secretary, should be seeking such help when it is needed.

You are coming together in the route to achieve your common objectives with building and promoting a destination route that will bring more economic activity to your area, which will lead to growing local tourism businesses and the improvement in the quality of life of your local communities. While the Secretary may focus mostly on the administrative aspects of leading the route, it is the task of the leaders, including the Secretary, to ensure that the bigger intentions are reflected in the route's activities and that these activities lead to positive results.

What are the Secretary's duties?

If the route is formally constituted as a company or a trust, the Secretary will have some legal duties associated with the function of Secretary. These duties mainly relate to keeping all records up-to-date at the Companies and Intellectual Property Commission (CIPC, previously called Cipro) and the Receiver of Revenue (Sars). In some instances, the Secretary may also be the person who must represent the company/trust/organisation for legal functions.

The route's founding document (constitution, memorandum of association or trust deed) will specify what other formal obligations the Secretary has. These are important aspects of the Secretary's role, but the responsibilities go beyond those formally listed in the founding document. It is important for the Secretary to study the founding document carefully with the aim to understand the intentions of the document in general, and the specific tasks and/or responsibilities assigned to the Secretary. The Secretary should also be aware

of all the provisions of the founding document, so that the specifications and rules are correctly applied.

In addition to the formal or legal requirements, the Secretary is also responsible for the route administration and internal communication. The key outcomes attended to by a good Secretary will be seen in the fact that members are well informed of what is happening, that information is stored to be easily available when needed, that the rules governing the route are correctly applied, and that all legal requirements are met.

But we should look beyond the narrowly defined tasks included in the founding document and defined in the law.

Broadly speaking, there are the areas of responsibility for the Secretary:

- Ensure that the route complies with all legally required administration.
- Manage the route's information, including filing of important documents, keeping record of decisions and minutes of meetings, and distributing documents.
- Keeping the route's communication channels open so that all members stay informed.

The systems used by the Secretary may vary in level of sophistication, depending on the route's requirements. For instance, in one route, a simple paper-based filing system and distributing hard copies of documents may be the best solution, while in another route, an online storing and document sharing platform may offer the required functionality.

There are specific aspects of the route's functioning where the Secretary plays a central role:

Meetings

For Route Forum meetings, general member meetings, or any other formal route meeting, the Secretary is tasked with:

- Sending our invitations in accordance with the provisions in the founding document for notice periods and the format of the notice.
- Receiving and recording of proxies or other forms of assigning authority to individuals to represent members at meetings (if applicable).
- Recording attendance at meetings and storing such attendance records.
- Taking minutes and/or record decisions at meetings, distribution of such minutes/records to the required people, and storing these minutes/records for future use.

Membership records

Except if membership administration is assigned to another Route Forum member, the Secretary is responsible for the following concerning membership:

- Receive applications for membership, process applications and communicate with applicants on the success or their applications, or if additional information is needed to process such applications, request such information from applicants.
- Keeping membership records up-to-date and reminding members to provide their new details should there be any changes.
- Sending reminders to members whose membership is about to expire.
- Support the Treasurer in collecting membership fees or other membership payments.

Functioning of the executive

Managing the information needed by the executive is one of the Secretary's most important tasks, since a well-functioning executive will allow the route to achieve good results.

The Secretary's role is not only to keep minutes or record of decisions at meetings of the executive, it is also to support the individual members of the executive in fulfilling their duties by ensuring that the route's information is organised systematically in is accessible when needed.

Information from committees

The Secretary will not be involved in all the route's committees or task teams, but is responsible for collecting and storing information relevant to the committees or task teams. In this regard, it is important for the Secretary to ensure that one person on each committee or task team is tasked with the secretarial duties of that committee or task team, and to receive the needed information from that person for storage.

The implementation of projects is normally assigned to committees or task teams. It is not the Secretary's job to monitor the progress of these committees or teams, but it is the Secretary's job to organise and store the reports submitted by these committees or task teams, and to ensure that these records are accessible for future use.

Use of this Guide

This Guide will help you understand the Secretary's role in the route. It does not provide you with detailed instructions on the requirements of your founding document – this is why it is important to read this Guide along with the route's founding document (constitution, memorandum of association or trust deed).

Other Guides, Examples and Resources

Other Guides and Case Studies in the Open Africa Route Toolkit will be of use:

- Guide: [How To Lead Your Route](#)
- Guide: [How To Have Effective Meetings](#)
- Guide: [How to serve as Chairperson](#)
- Guide: [How to serve as Treasurer](#)
- Guide: [How To Elect Your Route Leadership And Appoint Them To The Best Positions](#)
- Resource: [Video: Ken Blanchard On Situational Leadership](#)

Other resources to use

- Robert's Rules of Order – <http://www.robertsrules.org>