

# 2026 NCRSP Secretary Training:

## Google Tools + Robert's Rules Minutes Updates

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### Slide 1: 2026 Secretary Training: Google Tools + Robert's Rules Minutes Updates

Welcome, everyone. **Thank you** for saying **yes** to the work of secretary. If you are a local secretary, regional secretary, committee secretary, or a person who somehow became “the one who keeps the records,” you came to the right place.

Please look at the chat box for the attendance link to enter you into the drawing for a prize at the end of this presentation.

<https://www.google.com/url?q=https://forms.gle/ztAGBVbRe8iyEhTw6&sa=D&source=calendar&usd=2&usg=AOvVawIsgKwDG-uRwK70u3g5gzT7>

Today is about making the job feel lighter and to let you know **YOU ARE NOT ALONE!** The secretary does not just take minutes. The secretary protects continuity, accuracy, access, and trust. So when someone asks, “What did we decide?” the secretary helps the organization answer without panic, hunting, or archaeology.

This training updates my 2024 and 2025 videos with Google tools and the latest Robert's Rules guidance about minutes. The goal is simple: create records easily, find them faster, share them wisely, and hand them off with a smile. Saying YAY YAY YAY!

### Slide 2: By the Book Role

Here is the official “by the book” role of the NCRSP Secretary. It sounds clean and manageable: keep attendance, record minutes, distribute minutes, and maintain records.

Sounds easy, peasy, right? Well, if that were the whole story, no one would need a training. In real life, the secretary often becomes the memory keeper, file finder, name

corrector, agenda helper, report collector, and calm voice who says, “I think I know where that is.”

The official role gives us the foundation. The good news is that there are improved tools to help so we won't be buried under email attachments, mystery files, or a desktop that looks like a yard sale.

### **Slide 3: The Secretary's Role: Communicate, Record, Preserve**

And then there is the “ton of bricks” reality. Sometimes the secretary's job can feel as if a truck backed up and unloaded all the documents at once.

This is where the job becomes bigger than the job official description. The secretary helps the organization communicate, record, and preserve. The secretary must also respond to each president and group's needs. What they want determines how much and HOW we work.

Communication means helping with and creating agendas, correspondence, committee forms, members assistance, newsletter articles, websites, media, and sometimes the gentle art of reminding people to send their reports. Records means attendance, membership records, committee and ad hoc reports, minutes, motions, votes, and official documents. Minutes are simplified if you use the agenda as a guide and recording what was done, not writing every single word. Continuity means the next secretary's life will be easier.

The good news is that in 2026, we have more tools than ever to make those bricks behave.

### **Slide 4: In 2024 and 2025, I Focused on Saving**

In the past, much of my focus was on saving: saving documents, saving to hard drives, saving to the C drive, saving to external drives, saving to the cloud, and trying not to lose my mind in the process.

That “tangle of wires” image tells us a lot. Many of us know that feeling: Which version is current? Did I save it? Where did I save it? Did I email it? Did someone else revise it? Is it on my laptop, my desktop, my flash drive, OneDrive, Google Drive, or in an email from three Tuesdays ago?

We still need good saving habits. But now we can move from “Where on earth did I put it?” to “Here is the shared folder, and there it is.” That is a happy feeling!

## **Slide 5: Now, One Leader App Has Emerged**

For this training TODAY, that leader is Google Drive and the Google family of tools. Tomorrow may be a different story!

Now this does not mean every other tool is bad. It simply means Google gives us an easy, shared, browser-based way to create, save, search, collaborate, and control access. It also works across many devices, which is helpful because our members do not all use the same computers, phones, or have the same levels of patience.

So we are not throwing away the binder spirit. We are giving the binder wings. Or at least a cloud icon.

## **Slide 6: The 2026 Secretary’s Job: Less Hunting, More Serving**

This is the heart of the update: less hunting, more serving.

A shared folder can become one source of truth for agendas, minutes, reports, attendance, and handoff files. Officers can collaborate before the meeting by commenting, correcting names, and attaching reports. Records become searchable, so decisions can be found by keyword instead of by memory or guesswork. Access can be controlled so people receive what they need without giving everyone else the keys to the whole kingdom.

When the secretary spends less time hunting, the secretary has more time to serve members, support leadership, and keep the organization moving forward.

## **Slide 7: Freedom: The Secretary Job Can Be Tangle-Free**

We can have fewer entanglements. It's not perfect because we still send things at midnight with no subject line. But with LINX we won't forget the attachments!

With Google tools, you can be the source of truth. You can give officers what they need: agendas, minutes, reports, attendance, and organized files. You can reach out before meetings by sharing reports and draft materials ahead of time, so meetings are more efficient. And here is one of my favorite reminders: do not read minutes aloud unless you absolutely must. Let people read them ahead of time and save meeting time for corrections and action.

The promise here is instant corrections, instant saves, and instant accessibility. That feels like freedom.

## **Slide 8: Modern Secretary Tools: Help Us Work Smarter**

Here is the quick Google toolkit.

Google Docs helps us create and share agendas, minutes, and reports in real time. Google Forms helps us collect check-ins, registrations, surveys, and reports quickly. Google Sheets helps us track officer lists, attendance, databases, and action items. Google Drive stores folders, archives, shared files, and records for future leaders. Sharing permissions let us decide who can view, comment, or edit.

The bottom line is accessible, collaborative, and organized. Or, to say it another way: fewer mystery attachments, fewer frantic searches, and more breathing room. People can stop suddenly in a meeting and say, "JULIA, DON'T YOU KNOW WHEN THAT HAPPENED?" You can say, "I believe you will find that in the minutes document itself which everyone shares."

## **Slide 9: From Binder to Living Archive**

Many of us still love a binder. A binder is visible. It is comforting. It does not ask for a password. But a binder cannot be searched from your car, shared with an officer across the state, or handed off with one clean folder structure and somebody saying to you

“Yeah, I’ll share it, but you have to pay for delivery.” NO, it’s clean and EASY! People’s good or evil will is exposed immediately!

Google Drive lets us keep the binder spirit while adding cloud access and a clean file tree. A meeting folder might be named “6.10.26 AC Meeting.” Inside it, you can keep the agenda, attendance or check-in, draft minutes, reports, and the approved minutes all in one naked place.

This also helps the next secretary. Instead of inheriting scattered attachments, the next leader receives a coherent archive. That is not just organization. That is kindness.

## **Slide 10: Google Docs: The Agenda and Minutes Can Work for You**

Google Docs helps remove version-control headaches. An agenda can become a dashboard for the meeting itself, with links to real reports, approved motions, prior minutes, forms, and meeting materials.

For draft minutes, officers can comment or suggest corrections without overwriting the secretary’s working record. Everyone can work from one document instead of sending six versions with names like “final,” “final final,” and “really final this time.”

After the minutes are approved, you can save or export the official version as a PDF. You can keep the editable Google Doc in the archive as the working source, and keep the PDF as the stable official record.

## **Slide 11: Google Forms: Check-Ins that Become Attendance Records**

Google Forms can turn a sign-in sheet into a timestamped attendance record spreadsheet that you can SORT. Before the meeting, you can send a check-in link asking for name, local or unit, role, email address, and even if the person has a report or prefers certain types of gifts.

During Zoom or in person, the same form can be used for attendance, guest registration, committee breakouts, or report collection. After submission, responses can go directly into a Google Sheet with timestamps.

That is a secretary win: no retyping names from paper, no guessing email spellings, and no losing the attendance record. Also, no trying to decipher handwriting that looks like it was written during Helene.

## **Slide 12: Google Sheets: Databases without Starting Over Every Year**

Google Sheets helps us carry over our data without re-typing. Sheets can support rosters, action lists, officer contacts, attendance, and meeting trackers.

An officer contact list might be organized by region, local, president, vice president, secretary, treasurer, email, phone, and term. A meeting tracker might include dates, type of meeting, who's present and absent, guests, quorum notes, and a link to minutes. An action list can also include task, owner, due date, source meeting, status, and follow-up link.

The big advantage is that Sheets can be sorted, filtered, updated, and shared.

The caution is just as important: protect personal contact information and share the minimum access needed.

## **Slide 13: Sharing Is Powerful because Access Has Levels**

Sharing is powerful because access has levels. This is one of the most important things for us to understand.

A viewer can open and read. That is usually best for approved minutes, final reports, or public copies. A commentator can suggest or comment without changing the document directly, which is excellent for draft minutes review. An editor can change content, so editor access should be limited to people actively building the agenda, report, or database. Owner or manager access controls the file, so use it as you deem safe, and pass it on intentionally.

A good rule of thumb is: start restricted, then open access as needed. It is easier to unlock a door than to chase the cat after it has escaped. As the late Dr. Ramey said to me, “You can’t put the toothpaste back into the tube.”

## **Slide 14: A Safe Secretary Workflow for Shared Files**

Collaboration is easy, and you can keep sensitive information within limited access.

Start with restricted or targeted sharing for draft minutes, personnel items, financial documents, contact lists, and anything that is not intended for general circulation. After approval, share you can share a fixed PDF AND EVEN MAKE ONE running document of ALL approved minutes so that those special people can USE THE SEARCH FEATURE for efficient location of decisions. You can keep the editable source in the archive. You can separate public from private. As ever, be careful with shortcuts, because a shortcut may point to someone else’s live file.

This is the cloud version of the old discipline: save carefully, organize carefully, and protect the official record.

## **Slide 15: Robert’s Rules 12th Edition: Minutes Record Actions, Not Speeches**

Now we move from technology to Robert’s Rules. Under Robert’s Rules of Order Newly Revised, minutes are the official record of what was done, not a transcript of everything that was said.

Minutes should record the kind of meeting, organization, date, time, place, presiding officer, secretary, main motions, outcomes, and reports received or filed. Minutes should not include verbatim debate, personal opinions, editorial summaries, he-said/she-said commentary, or unapproved side conversations.

For reports, record the committee or officer name and whether the report was received or filed. Keep the written report with the meeting records. With Google Drive, that can be as simple as storing or linking the report in the meeting folder. The guiding question is: What official action happened?

## **Slide 16: Minutes Are Not Put to a Formal Vote**

This is one of the most important updates in the training: minutes are not put to a formal vote.

Under standard parliamentary law, the chair asks, “Are there any corrections to the minutes?” Members offer corrections directly. If there are no corrections, or after corrections are handled, the chair declares the minutes approved as written or approved as corrected.

No motion to approve. No second. No formal vote. I know that may feel strange if we have been doing it the old way for years, but this process is actually simpler. The secretary listens for the chair’s declaration and records that the minutes were approved as written or as corrected.

## **Slide 17: When Corrections Are Disputed, the Assembly Decides**

Most corrections are simple: a misspelled name, wrong date, missing title, or wording that needs to match the motion more accurately. If no one objects, the correction is made by consent.

If members disagree about what happened, then the assembly decides the correction by majority vote. That vote is not a vote to approve the minutes. It is a vote on the disputed correction.

Also, a member may participate in correcting or approving minutes even if that member was absent from the meeting being corrected. The purpose is accuracy of the organization’s record, not a test of who was in the room.

## **Slide 18: Suggested Script for the Chair and Secretary**

This is the simple language that keeps everyone calm and clear.

The chair says, “The draft minutes of [date] were distributed. Are there any corrections?” Then the chair pauses. If there are no corrections, the chair says, “There being no corrections, the minutes are approved as written.” If corrections are made,

the chair says, “If there are no further corrections, the minutes are approved as corrected.”

The secretary’s notation can be simple: “The minutes of [date] were approved as written,” or “The minutes of [date] were approved as corrected.” Consistent language helps everyone understand that the minutes were handled properly.

## **Slide 19: Put Google Tools and RONR Together**

Now let’s put the technology and the procedure together.

Before the meeting, create the agenda in Google Docs, link reports, send a Forms check-in, and share draft materials with proper access. During the meeting, use the agenda as your note structure and track motions, outcomes, attendance, times, and reports received. After the meeting, draft the minutes and invite corrections through comments. At the meeting where minutes are considered, the chair uses the corrections script. After approval, export the final PDF and store it in the meeting folder with the reports and attendance record.

Modern tools should make parliamentary accuracy easier, not looser. The tool helps, but the secretary still protects the record.

## **Slide 20: What to Demonstrate Live in the Zoominar**

For the live demonstration, we will keep it practical. First, open Google Drive from the waffle. And yes, Google calls it the App Launcher, but “waffle” is much more fun, and frankly, it looks like breakfast.

Then create a sample meeting folder and name it by date and meeting type. Add the agenda, minutes, reports, attendance, and anything else needed for that meeting. Next, show how sharing roles work: restricted access, anyone with the link, viewer, commenter, and editor. Then build a simple Forms check-in with name, local, role, email, and report. Link responses to Sheets.

Finally, return to the minutes approval script and listen for the chair’s cue: “Are there any corrections?” Through trial and error, confidence will build. Nobody has to learn every button today.

## Slide 21: Motion Sickness and Favorite Fixer

There is a sick SICK SICK feeling when someone moves business and the presiding officer asks, What was the motion again? Julia, repeat it? **Well!** Via Zoom, the CHAT window can be the crusader of truth. If the person initiating the motion cannot type the CHAT, you, can enter it into CHAT. You'll have lots of helpers correcting you. **Live in-person mtgs**, can have forms completed. At an NEA-R mtg, the secretary from Washington state sent us this sample form.

**AND** the most wonderful keystroke shortcut I love is CONTROL KEY and the Z letter button. Together, they bring you back in your time machine BEFORE you over typed or deleted something IMPORTANT! You can be braver in trying new things with this trusty shortcut under your fingertips.

## Slide 22: Closing: The Secretary Keeps Democracy Visible

Good records make leadership accountable and succession possible. When we organize records well, we protect members, decisions, history, and the next secretary.

The secretary sheds light on the work of the organization. Minutes, reports, forms, folders, and archives are not just paperwork. They are how members know what happened, how leaders follow through, and how future officers continue the work without starting from scratch.

Records. Access. Accuracy. Handoff. That is our service. Thank you for doing this work, for caring about the details, and for helping NCRSP keep its memory alive.

## Slide 22: Sources and Training Materials

This final slide gives everyone a place to continue learning. It includes the NCRSP secretary materials, Google help resources, Robert's Rules resources, and the materials used to update this training.

Technology changes almost daily, so please do not worry about memorizing every button. The most important thing is the workflow: create the record, control access, preserve the official version, and make it searchable for the future.

Thank you for your time, your good humor, your patience with technology, and your service to our members. May your folders be findable, your links be kind, your minutes be accurate, and your Wi-Fi be strong.

## Source note

Adapted from the updated 22-slide NCRSP Secretary Training PowerPoint and the NCRSP Secretary Role transcript. The transcript emphasizes the secretary's role in communication, attendance, membership records, minutes, reports, archives, and handoff materials; the revised deck adds Google collaboration tools, shared access levels, Forms-to-Sheets workflows, and the Robert's Rules minutes process.