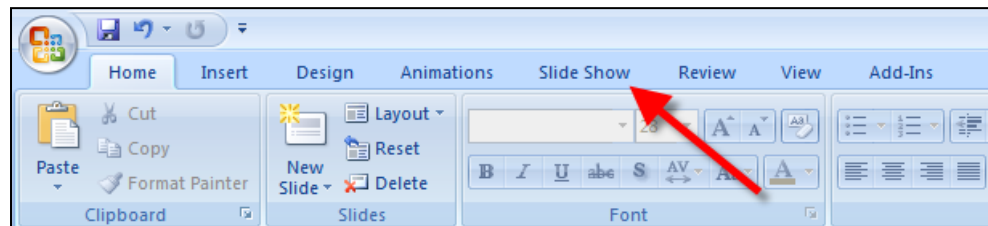


Before You Begin

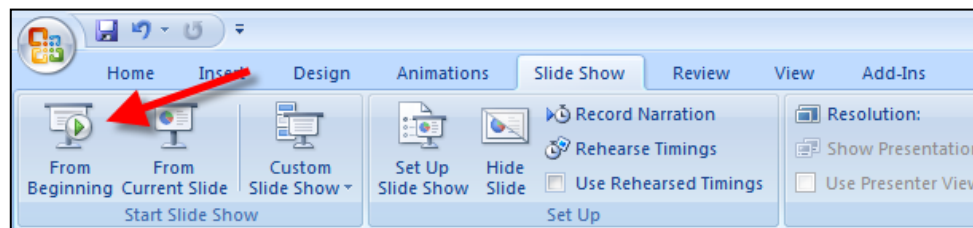
This presentation should be viewed as a
PowerPoint Slide Show

To view as a slide show:

1. Click on 'Slide Show' from the menu at the top of the screen.



2. Select 'From Beginning'



Before You Begin

Welcome to Club Officer Training

This online module is separated into 5 sections, which can be completed in a 30 – 45 minute session, or over a course of several sessions.



For additional assistance, contact your District 27-D1 Global Action Team:

GLT Lion Tony Sobczak tonysobczak@yahoo.com

GMT Lion Adam Crowson adam.crowson@gmail.com

GST Lion Bruce Voight bfvoight@gmail.com

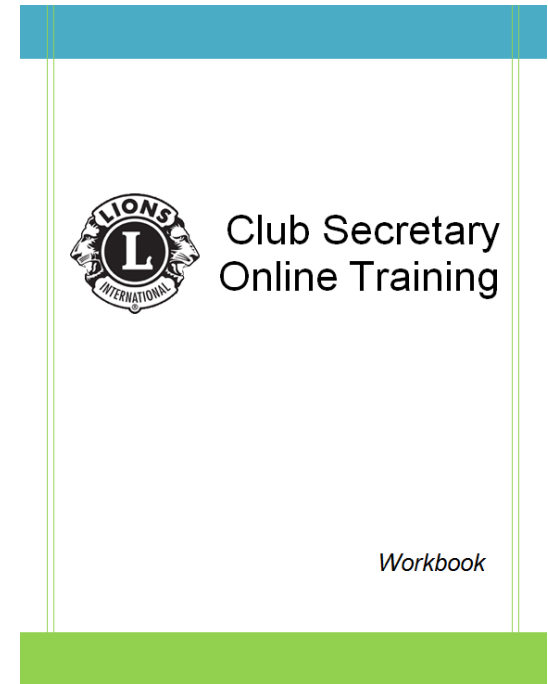


Workbook

This online module includes a workbook to enhance your learning experience.

Organized into 5 corresponding sections, it provides opportunities to take notes and obtain additional information to supplement the concepts addressed in this online module.

Click [here](#) if you need to access and print your workbook before continuing.



Workbook

Please note:


Club secretaries' responsibilities vary according to regional practices and established club procedures.





Navigation



You can navigate to various sections in the online module when certain icons appear.

Each slide runs through a timed program. Once that is complete, an arrow in the lower right hand corner  will indicate that you can click to the next slide when you are ready.

 indicates a link to a resource on the LCI website or publication. When you click on this icon, you will be directed to that resource. Links will also be available in the Resource section of this online module.

Clicking  returns you to the Table of Contents slide if you want to review or jump to specific sections.



Welcome



You have been elected to the position of
Club Secretary



Objectives

This course will provide you with the basic information and resources necessary to prepare you for your new position.

Upon completion of this course, you will be able to:

- Recognize the purpose of a Lions club and its placement within the structure of the Lions Clubs International
- Summarize the responsibilities of club secretary
- Access additional resources as needed



Table of Contents

Click on the links below to navigate to a specific section, or click the arrow to continue to Section 1.

Section 1: [Introduction](#)

Section 2: [Your Club Leadership Team](#)

Section 3: [Responsibilities of the Club Secretary](#)

Section 4: [Planning Your Term](#)

Section 5: [Resources](#)





Welcome to Section 1: *Introduction*

Please turn to page 1 of your workbook.





As secretary, you are an integral part of the leadership team, working to support the club president as he or she leads your club in service activities that help support your local community and surrounding areas.

However, it's also important to remember that you are a part of something much bigger.

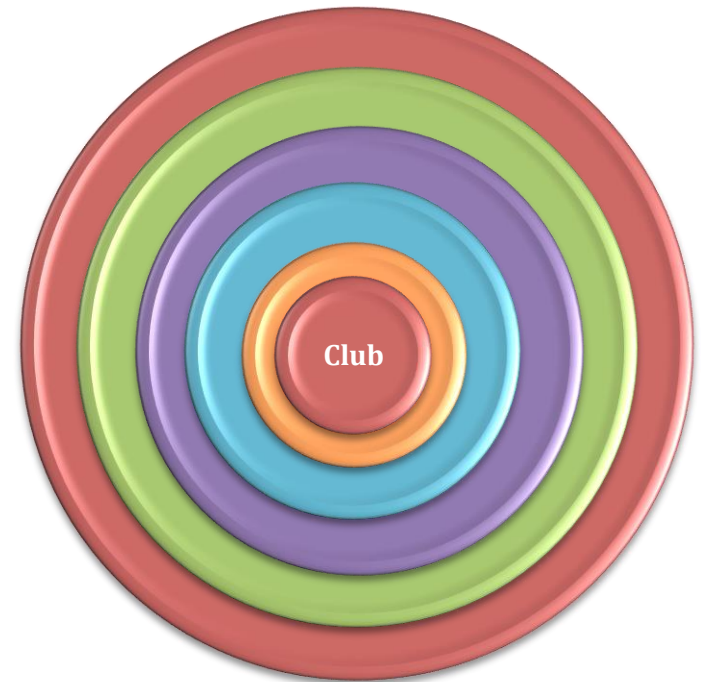


Structure of Lions Clubs International



Lions Clubs International is comprised of a large network of Lions, with clubs at the center.

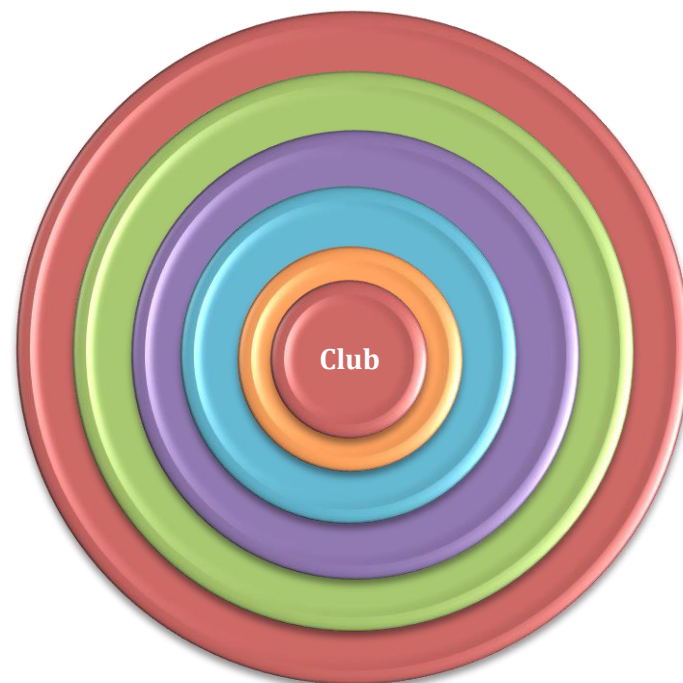
This structure facilitates communication and promotes service on a local, regional and global scale.



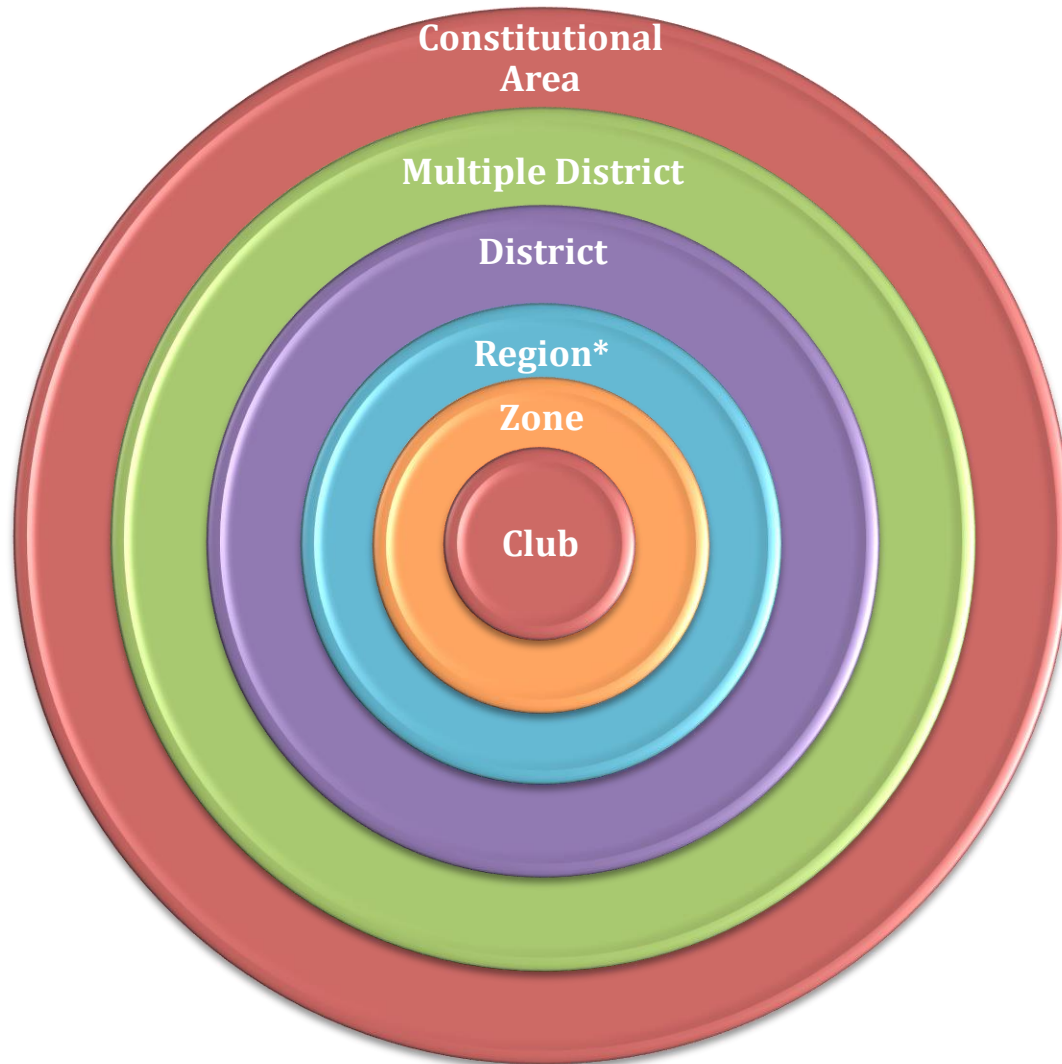


The next slide will help you complete page 1 in your workbook.

Please take a moment to complete this section.



Structure of Lions Clubs International

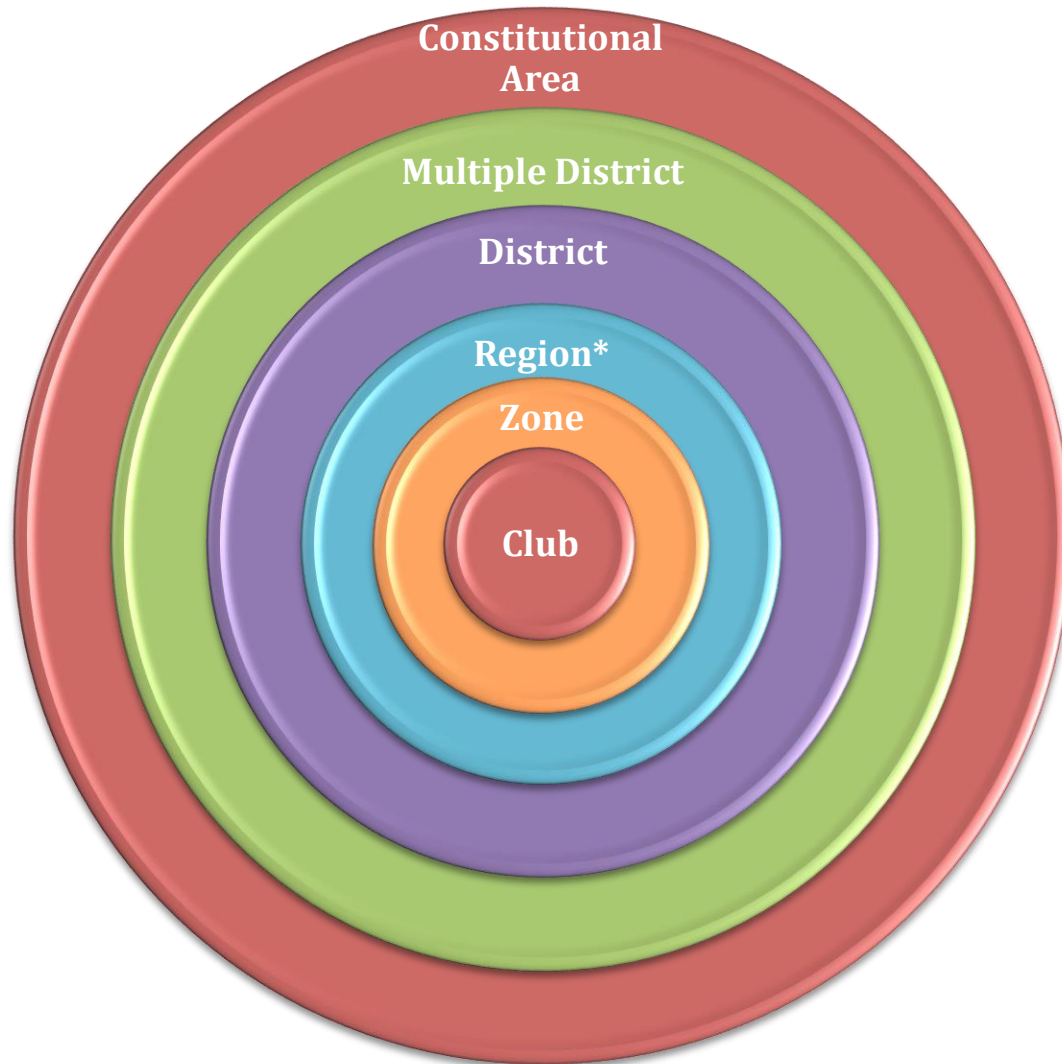


- A club consists of a minimum of 20 members
- A zone consists of 4 – 8 clubs
- A region consists of 10 – 16 clubs *
- A district is comprised of at least 35 clubs with 1250 active members
- Several districts in a given geographical area comprise a multiple district
- Each Lions club is located in one of the seven Constitutional Areas, which is represented by at least one international director

*optional



Structure of Lions Clubs International



Individual clubs and their members are at the heart of the Association.

Without their commitment to serving others locally, we could not maintain our legacy of global service.





As a club within the greater International Association of Lions Clubs, your mission is:

TO EMPOWER volunteers to serve their communities, meet humanitarian needs, encourage peace and promote international understanding through Lions clubs.



Purpose of Lions Clubs



For our mission to become a reality, our clubs need to serve many purposes.

Let's do a quick check of the Standard Club Constitution and By-Laws to see if you know all the purposes of a Lions club.





You will see a series of statements.
Select “Yes” if the statement reflects one of the stated purposes
of Lions clubs or select “No” if it is not a stated purpose of
Lions clubs.



Purpose of Lions Clubs



Here is the first statement.

The purpose of Lions clubs is...

To unite the members in the bonds of friendship, good fellowship and mutual understanding.

Click on either YES or NO

YES

This is one of the stated purposes of Lions clubs



Purpose of Lions Clubs



Here is the next statement.

The purpose of Lions clubs is...

To encourage service-minded people to serve their community without personal financial rewards, and to encourage efficiency and promote high ethical standards in commerce, industry, professions, public works and private endeavors.

Click on either YES or NO

YES

This is one of the stated purposes of Lions clubs



Purpose of Lions Clubs



Are you ready for another one?

The purpose of Lions clubs is...

To take an active interest in the civic, cultural, social and moral welfare of the community.

Click on either YES or NO

YES

This is one of the stated purposes of Lions clubs



Purpose of Lions Clubs



Okay, those were a little easy.
Let's try one that is a bit more difficult.

Which of the following statements is NOT a stated purposes of Lions clubs?

Click on your answer.

To create and foster a spirit of understanding among the people of the world.

To promote political leaders who support the mission of Lions clubs.

To promote the principles of good government and good citizenship.

To provide a forum for the open discussion of all matters of public interest...

You can review all 6 statements of purpose in Article II of the Standard Club Constitution



Purpose of Lions Clubs



How can you help promote the mission and purpose of
Lions clubs?

Write your answer on page 2 of your workbook.





Welcome to Section 2: Your Club Leadership Team

Please turn to page 3 of your workbook.





Each Lions Club is comprised of a team of leaders that support the activities of the club.

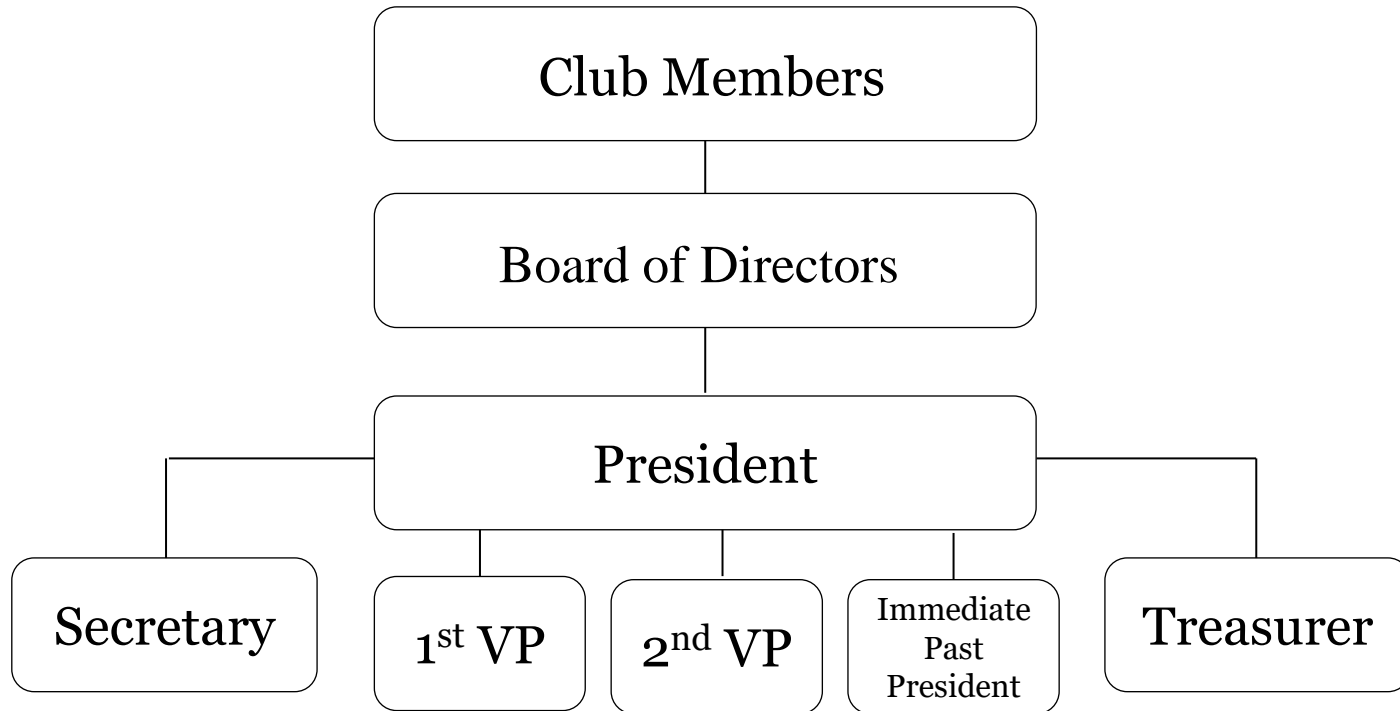
The next slide will help you complete the club organizational chart on page 3 of your workbook.



Your Club Leadership Team



Let's take a look at the Club Organizational Chart

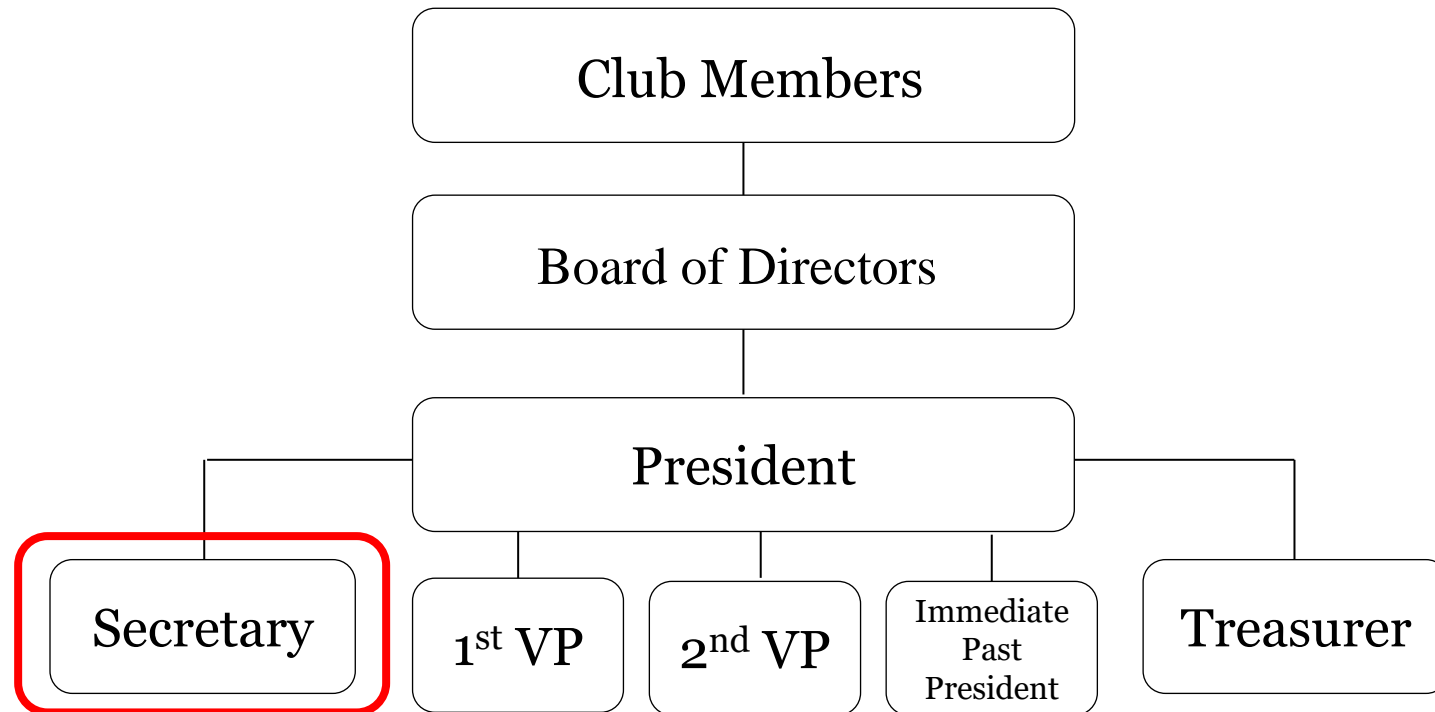


Your Club Leadership Team



As secretary, you are the business manager of the club.

- You are the liaison officer between the club and your district as well as the Association.
- You are under the supervision of the president and the board of directors.





The board of directors includes:

- the president
- the immediate past president
- vice presidents
- secretary
- treasurer
- Lion tamer (optional)
- tail twister (optional)
- membership chairperson
- club service chair
- any other elected directors

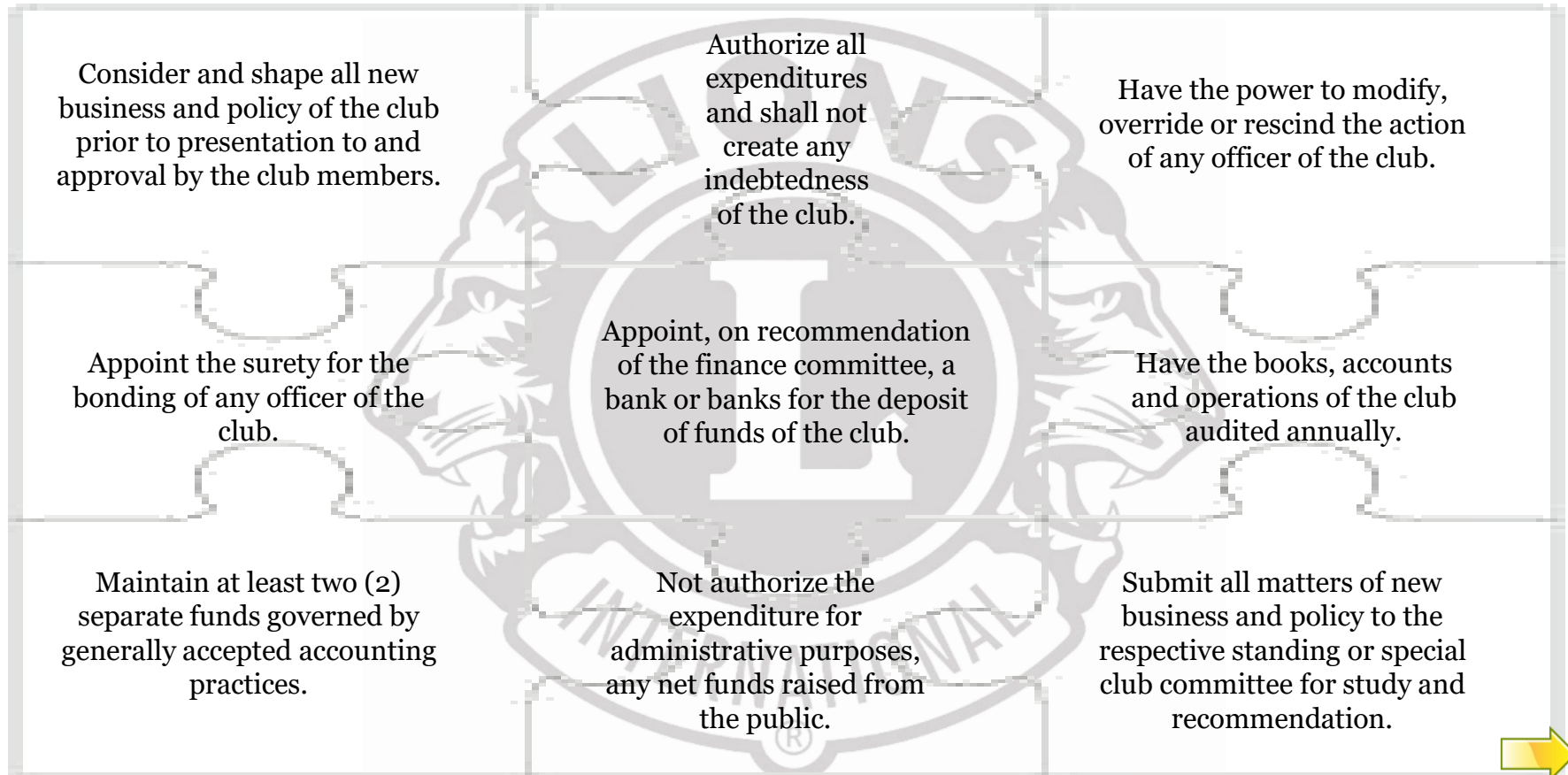
A description of each role can be found on page 7 of the Club Officer Team Manual



Your Club Leadership Team



Now let's take a quick look at your shared responsibilities.
Together the board of directors shall...



Your Club Leadership Team



What are some things you can do as club secretary to help the club leadership team work well together?

Record your answer on page 4 of your workbook.





The Lions Learning Center offers free online courses to assist members with leadership development.

Additional Resources

Consider taking the following online courses:

- ☐ Introduction to Lions Leadership
- ☐ Effective Listening
- ☐ Effective Teams

More information about the Lions Learning Center can be found here.



You will need to log in to MyLion.





Welcome to Section 3:

Responsibilities of the Club Secretary

Please turn to page 5 of your workbook.



Responsibilities of the Club Secretary



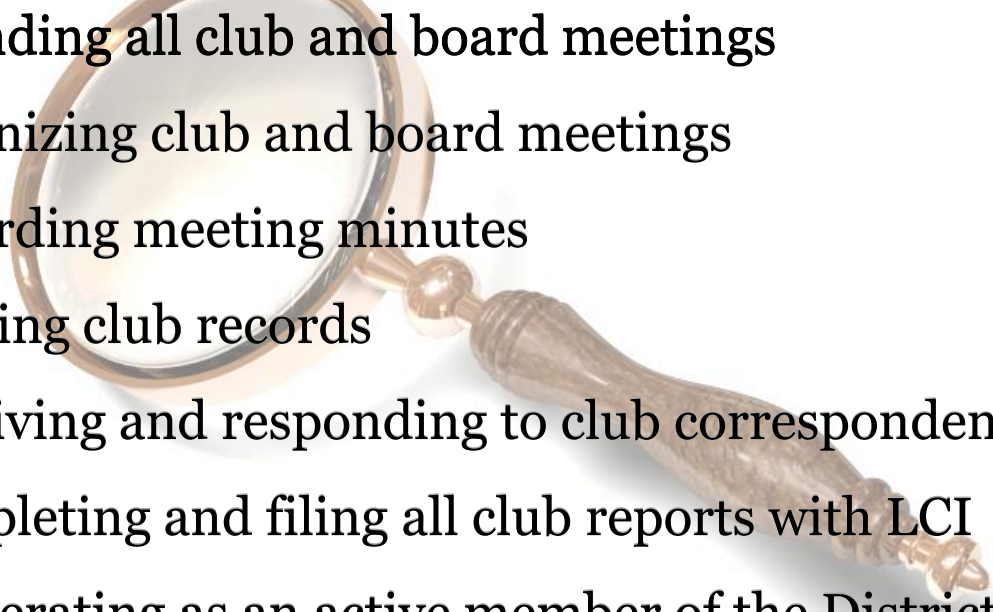
As the club business manager and member of the board of directors, your primary responsibilities include...

- ❖ Attending all club and board meetings
- ❖ Organizing club and board meetings
- ❖ Recording meeting minutes
- ❖ Keeping club records
- ❖ Receiving and responding to club correspondence
- ❖ Completing and filing all club reports with LCI
- ❖ Report your club's service hours on MyLion
- ❖ Cooperating as an active member of the District Governor's Advisory Committee of the zone





How many meetings will you need to attend?

- 
- A magnifying glass with a wooden handle and a brass-colored frame, positioned diagonally across the list of responsibilities.
- ❖ Attending all club and board meetings
 - ❖ Organizing club and board meetings
 - ❖ Recording meeting minutes
 - ❖ Keeping club records
 - ❖ Receiving and responding to club correspondence
 - ❖ Completing and filing all club reports with LCI
 - ❖ Cooperating as an active member of the District Governor's Advisory Committee of the zone





The following schedule is common:

Types of Meetings

Monthly

- Board of Directors regular meeting
- Club regular meeting

As Needed

- Board of Directors special meetings (when requested by 3 or more board members)
- Club special meetings (requested at least 10 days prior)

Annually

- Officer transition meeting
- Charter Anniversary



Responsibilities of the Club Secretary



A large portion of your responsibility is linked to organizing meetings.

Let's take a closer look.

- ❖ Attending all club and board meetings
- ❖ Organizing club and board meetings
- ❖ Recording meeting minutes
- ❖ Keeping club records
- ❖ Receiving and responding to club correspondence
- ❖ Completing and filing all club reports
- ❖ Cooperating as an active member of the District Governor's Advisory Committee of the zone





Your meeting duties consist of 3 stages.

1. Before the meeting
2. During the meeting
3. After the meeting

Take a moment to answer the questions on pages
5 & 6 of your workbook.



Responsibilities of the Club Secretary



Stage 1 – Before the meeting

- Provide members with advance notice of meeting dates/times
- In conjunction with the president, create a meeting agenda
- Assemble any correspondence to give to appropriate chairpersons or members
- Prepare awards or new member kits if necessary
- Prepare club roster for taking attendance





Stage 2 – During the meeting

- Take attendance
- Record meeting minutes
- Document any guest speakers, non-Lion visitors and visiting Lions
- Collect and record dues and give members receipts
- Gather activity information from committee chairpersons
- Ask new members to fill out appropriate forms





Stage 3 – After the meeting

- Record attendance
- Record awards presented
- Verify money collected and record payment of dues
- Deposit or present money collected to the treasurer and obtain receipt
- File/distribute a copy of the meeting minutes after they are approved
- Follow up on any outstanding issues from the meeting



Responsibilities of the Club Secretary



The secretary is also responsible for preparing for board meetings. Refer to page 6 in the workbook for more details.

It is important to remember that secretaries' responsibilities vary according to regional practices and established club procedures.

You should adapt the suggestions in this module to fit your club's needs.

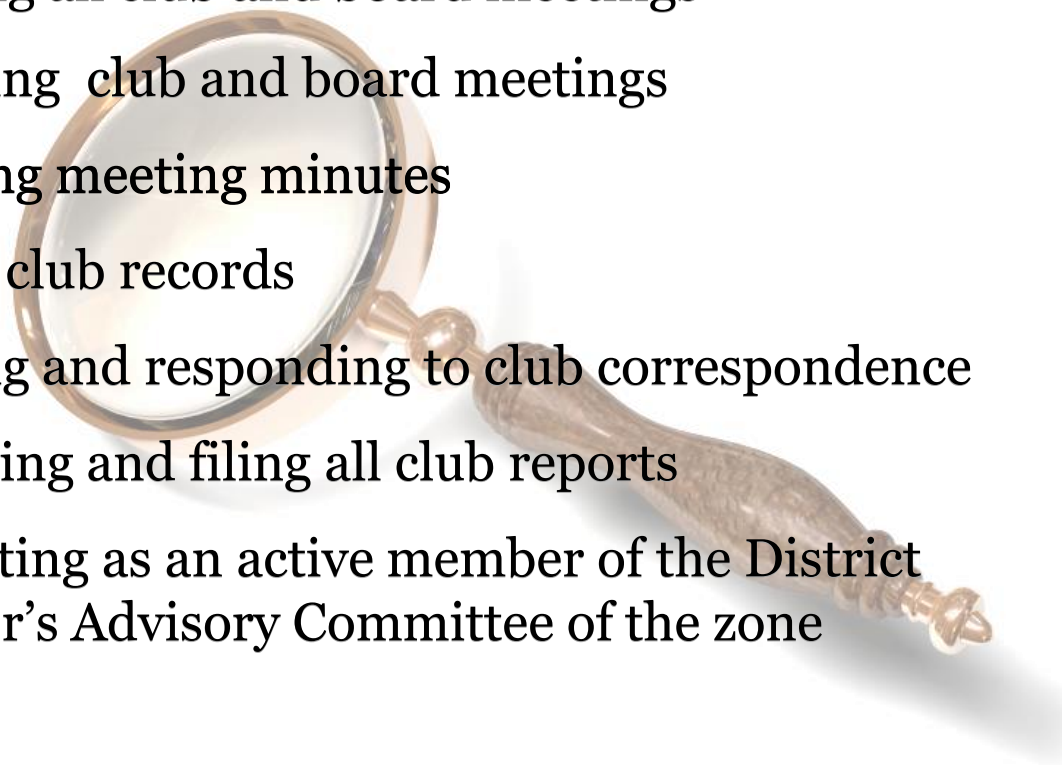


Responsibilities of the Club Secretary



Now let's look at recording meeting minutes

- ❖ Attending all club and board meetings
- ❖ Organizing club and board meetings
- ❖ Recording meeting minutes
- ❖ Keeping club records
- ❖ Receiving and responding to club correspondence
- ❖ Completing and filing all club reports
- ❖ Cooperating as an active member of the District Governor's Advisory Committee of the zone



Responsibilities of the Club Secretary



Spend some time with the outgoing secretary to review the current way minutes are taken.

Typically, minutes will record...

- Type of meeting (Regular, Special or Board)
- Date and place of meeting
- Name of person presiding over meeting
- Whether previous meeting minutes were approved
- All motions, their movers and whether the motions were sustained or lost
- All points of order and appeals and whether they were sustained or lost
- Time the meeting was called to order and adjourned



Responsibilities of the Club Secretary



Minutes are meant to record what the club does and not what members say.

Therefore, debate is considered informal and not recorded.

Proper terminology is important and should be used.

Please refer to page 7 in your workbook for more details.

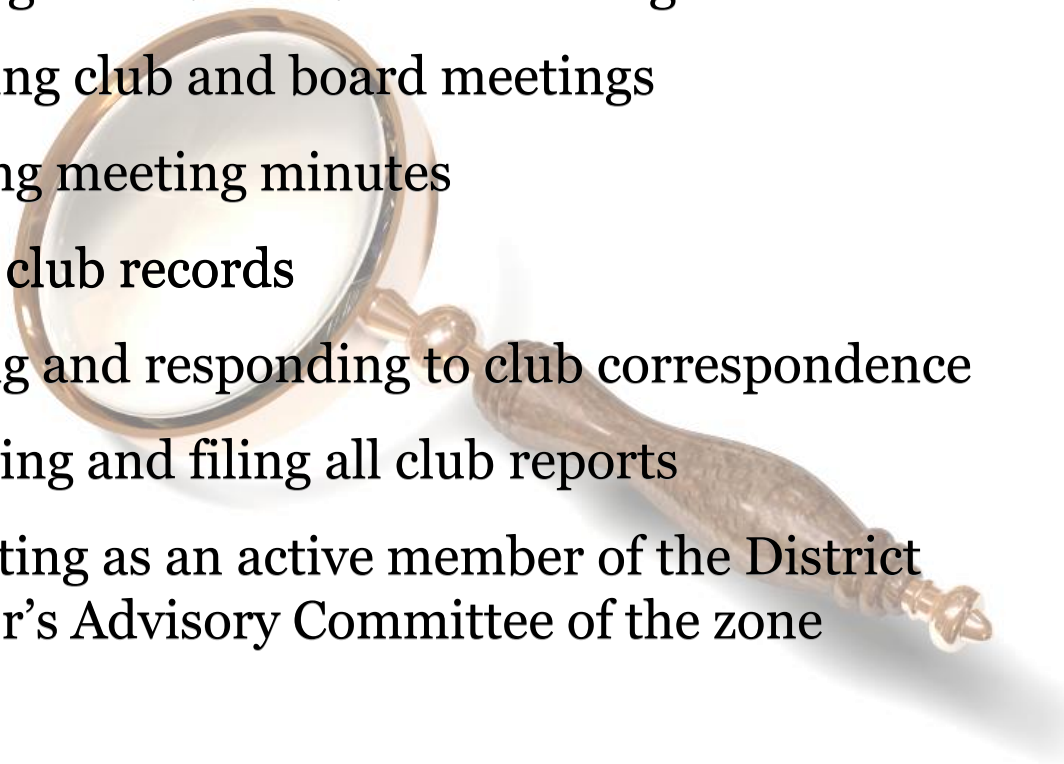


Responsibilities of the Club Secretary



We will next look at keeping club records.

- ❖ Attending all club and board meetings
- ❖ Organizing club and board meetings
- ❖ Recording meeting minutes
- ❖ Keeping club records
- ❖ Receiving and responding to club correspondence
- ❖ Completing and filing all club reports
- ❖ Cooperating as an active member of the District Governor's Advisory Committee of the zone



Responsibilities of the Club Secretary



Club files should include:

- The club charter
- The constitution and by-laws
- The club history
- Minutes of all club and board of directors meetings
- Annual reports of club officers and committees
- Activity reports
- Roster of club members

If your club does not have a system for maintaining records, including attendance and payment of dues, get one started now.

Take a moment to answer the question on page 8 of your workbook.

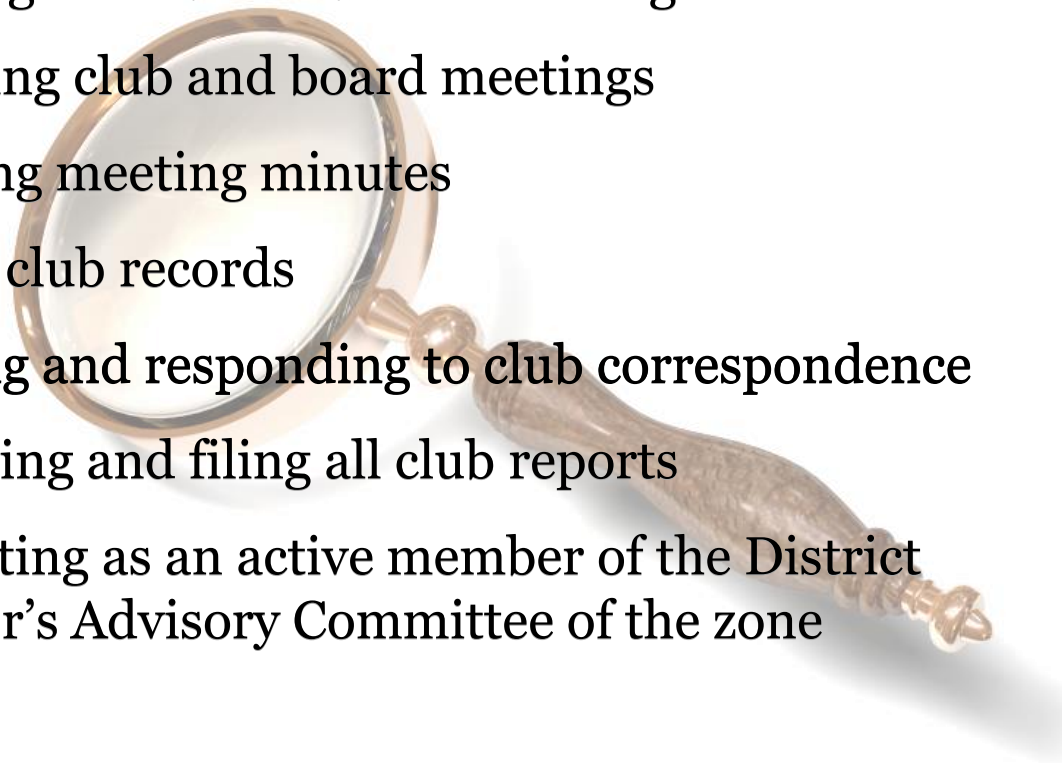


Responsibilities of the Club Secretary



We will next look at club correspondence.

- ❖ Attending all club and board meetings
- ❖ Organizing club and board meetings
- ❖ Recording meeting minutes
- ❖ Keeping club records
- ❖ Receiving and responding to club correspondence
- ❖ Completing and filing all club reports
- ❖ Cooperating as an active member of the District Governor's Advisory Committee of the zone



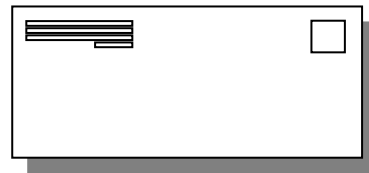
Responsibilities of the Club Secretary



The club secretary receives a lot of information, from LCI and the district pertaining to training, events, and meetings.

Correspondence may come electronically or through post and involve the president, treasurer, committee and/or project chairpersons.

It is important that all correspondence is opened, read and distributed in a timely manner.



You may record notes on page 9 of your workbook.



Responsibilities of the Club Secretary



It is strongly recommended that the club secretary and president meet at the start of the term to discuss how correspondence will be answered, kept and reported.

In some clubs, the secretary is responsible for the club newsletter and is integral to the club's public relations.

If you are not responsible for these duties, it will be important for you to be in close contact with those who are. This ensures all important club news is published.

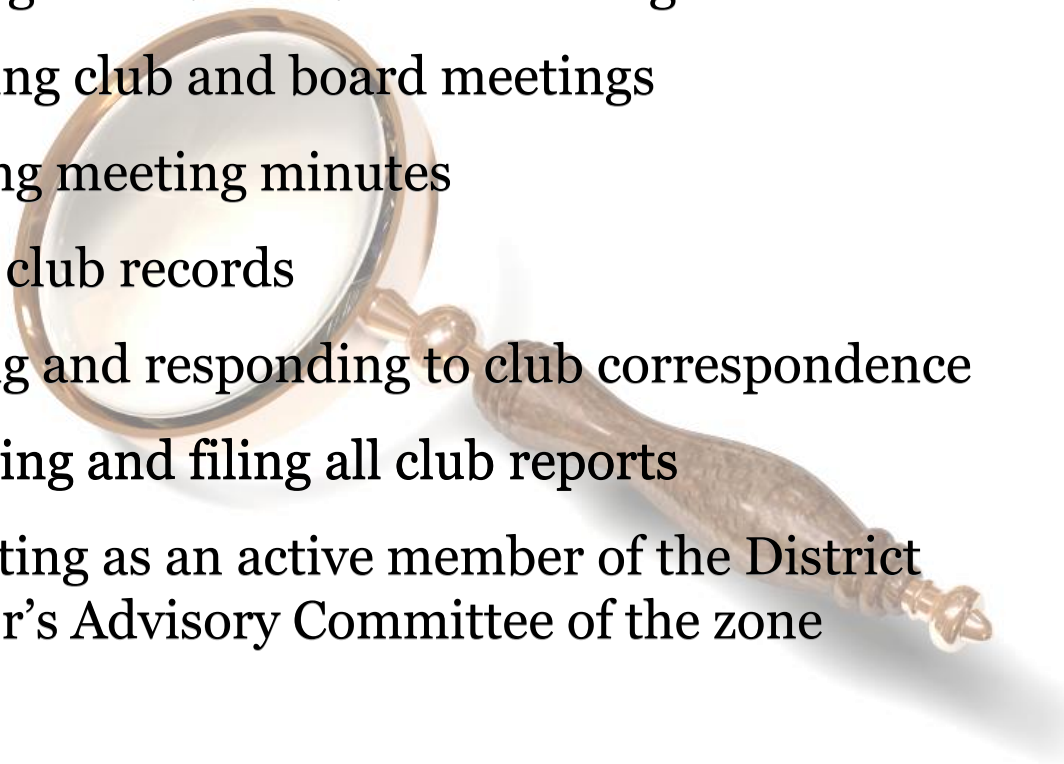


Responsibilities of the Club Secretary



Completing and filing club reports is another major duty of club secretary.

- ❖ Attending all club and board meetings
- ❖ Organizing club and board meetings
- ❖ Recording meeting minutes
- ❖ Keeping club records
- ❖ Receiving and responding to club correspondence
- ❖ Completing and filing all club reports
- ❖ Cooperating as an active member of the District Governor's Advisory Committee of the zone



Responsibilities of the Club Secretary



It is important to submit accurate and timely reports as your club strives to earn the *Club Excellence Award*.

Some of the reports and forms you will be responsible for include:

- Monthly Membership Report
- Monthly Club Service Activity Report
- Club Officer Report
- Club Supplies Order Form



Responsibilities of the Club Secretary



MyLion is the reporting website used by Lions Clubs in our district to report service activities for your club. You can access the website at www.mylion.org.

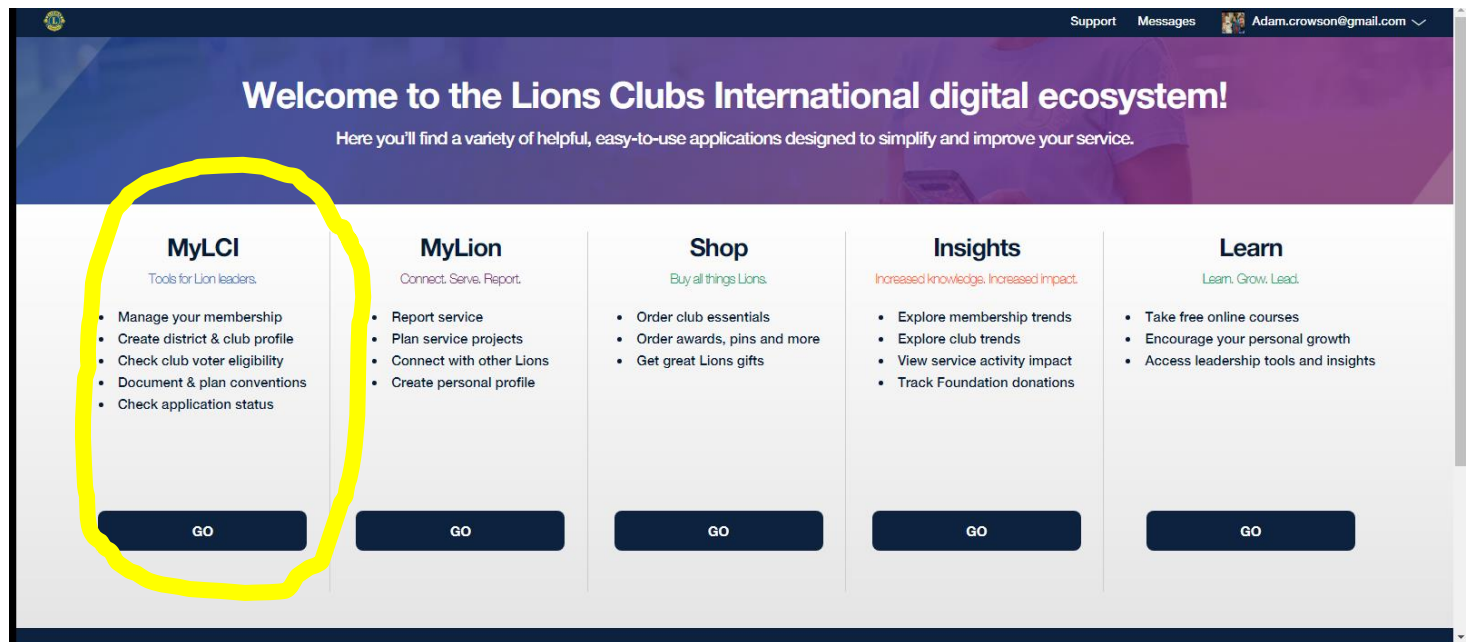
The screenshot shows the homepage of the Lions Clubs International digital ecosystem. The header includes a navigation bar with 'Support', 'Messages', and a user profile 'Adam.crowson@gmail.com'. The main heading is 'Welcome to the Lions Clubs International digital ecosystem!' with a subtext: 'Here you'll find a variety of helpful, easy-to-use applications designed to simplify and improve your service.' Below this, there are five main sections: 'MyLCI', 'MyLion', 'Shop', 'Insights', and 'Learn'. The 'MyLion' section is highlighted with a yellow circle. Each section has a list of features and a 'GO' button.

MyLCI	MyLion	Shop	Insights	Learn
Tools for Lion leaders.	Connect. Serve. Report.	Buy all things Lions.	Increased knowledge. Increased impact.	Learn. Grow. Lead.
<ul style="list-style-type: none">• Manage your membership• Create district & club profile• Check club voter eligibility• Document & plan conventions• Check application status	<ul style="list-style-type: none">• Report service• Plan service projects• Connect with other Lions• Create personal profile	<ul style="list-style-type: none">• Order club essentials• Order awards, pins and more• Get great Lions gifts	<ul style="list-style-type: none">• Explore membership trends• Explore club trends• View service activity impact• Track Foundation donations	<ul style="list-style-type: none">• Take free online courses• Encourage your personal growth• Access leadership tools and insights
GO	GO	GO	GO	GO

Responsibilities of the Club Secretary



MyLCI is where report any changes in your club's membership, including adding and dropping members, or changing their contact information. You are expected to file a Monthly Membership Report at this website, which tells LCI if your club had any changes for the month. You can access this site at: mylci.lionsclubs.org



Responsibilities of the Club Secretary



There are many benefits to using MyLion and MyLCI

You can:

- Submit monthly membership and officer reporting forms online
- View, update and download club member information or print membership cards
- Log your club's service activities each month
- Review successful service activities that other clubs have shared

You may record notes on page 9 of your workbook.



Responsibilities of the Club Secretary



Once new club officers are reported to LCI headquarters, an email will be sent, providing information on how to access the system and select your password.

You will find links to MyLCI video tutorials and frequently asked questions in the Resource section of this training module.

More information on submitting reports can also be found on the Club Officers page.





Wow!

That is quite a responsibility.

Let us do a quick review of what has been covered so far.



Responsibilities of the Club Secretary



You can find assistance with the answers in section 3 of your workbook

Question 1

Club minutes typically record all the following except

- a) The type of meeting being held
- b) The date and place of the meeting
- c) Who said what at the meeting
- d) The time the meeting was called to order

Discussion is not reported, only those members who made a motion or seconded one are recorded.



Responsibilities of the Club Secretary



You can find assistance with the answers in section 3 of your workbook

If a motion does not receive enough votes, it is reported as having failed.

Question 2

True

False

It would be reported as “lost” or “defeated”

Click on your answer



Responsibilities of the Club Secretary



Here is your last question.

You can find assistance with the answers in section 3 of your workbook

Question 3

Club Secretaries are responsible for all but the following?

- a) Ordering club supplies
- b) Scheduling meetings
- c) Reading and distributing club correspondence
- d) Maintaining club files

The club president is responsible for scheduling meetings however the club secretary is responsible for notifying meeting participants.

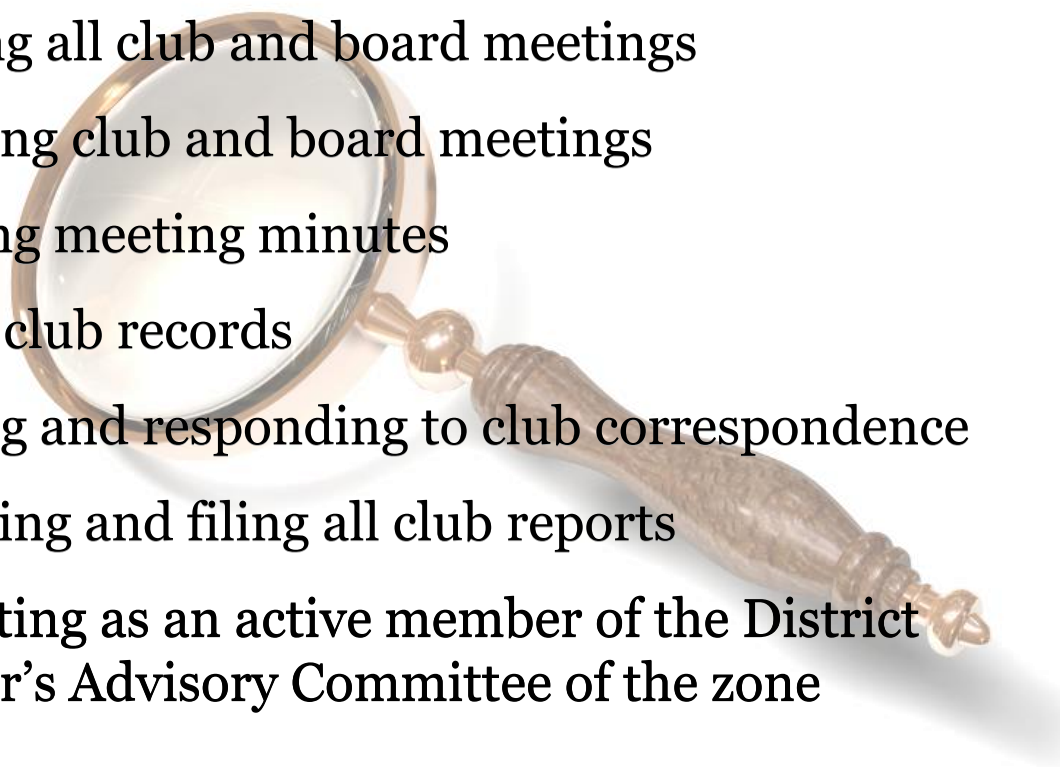


Responsibilities of the Club Secretary



The last topic to cover under responsibilities are your commitments beyond your own club.

- ❖ Attending all club and board meetings
- ❖ Organizing club and board meetings
- ❖ Recording meeting minutes
- ❖ Keeping club records
- ❖ Receiving and responding to club correspondence
- ❖ Completing and filing all club reports
- ❖ Cooperating as an active member of the District Governor's Advisory Committee of the zone





The District Governor's Advisory Committee

DG's Advisory Committee

The District Governor's Advisory Committee is comprised of

- the zone chairperson
- the club presidents and
- club secretaries within the zone

This committee advises the zone chairperson about matters within the zone and makes recommendations on matters affecting all clubs in the district.

The zone chairperson then shares the recommendations with the district governor and the district cabinet.

Please answer the question at the top of page 10 of your workbook.





As a member of the District Governor's Advisory Committee, you will be expected to...

DG's Advisory Committee

- Work with the zone chairperson to ensure every club in your zone operates efficiently and follows the Association's Constitution and By-Laws
- Promote attendance at the district, multiple district and international conventions
- Promote attendance at charter nights
- Discuss ways of helping clubs that need assistance with membership growth or leadership development
- Promote various club functions and events, such as inter-club meetings, installation of club officers, induction of new members or ceremonies honoring Key Award recipients



Responsibilities of the Club Secretary



You may also be requested to...

DG's Advisory Committee

- Assist in compiling reports in preparation for the Advisory Committee Meeting
- Assist with preparations if your club is chosen to host a zone meeting.





The District Governor's Advisory Committee is expected to meet at least three times annually.

Attending meetings...

- Allows you to exchange ideas regarding programs, projects, fundraising and membership issues
- Offers a forum for establishing cooperative relationships between clubs
- Gives you the opportunity to meet other Lions in your area

Benefits

Please answer the question at the bottom of page 10 of your workbook.



Responsibilities of the Club Secretary



The Lions Learning Center offers free online courses to assist members with leadership development.

Additional Resources

Consider taking the following online courses:

- ☐ Public Relations
- ☐ Public Speaking
- ☐ Meeting Management

More information about the Lions Learning Center can be found here.





Welcome to Section 4: Planning Your Term

Please turn to page 11 of your workbook.



Planning your Term



The goal of this section is to provide you with guidance for structuring your term as club secretary.

We will ...

- Identify ways to prepare for your new role and responsibilities
- Outline the ongoing actions you will need to undertake throughout your term
- Identify items to consider as your club transitions to the next leadership team



Planning Your Term



Please complete pages 11 & 12 in your workbook to give you quick access to your responsibilities throughout the term.

Section 4: Planning Your Term

Preparing for your term	
Monthly	
Quarterly	





Before you officially take office, there are a several steps you can take to better prepare yourself.

Preparing for your Term

- Attend Club Officer Training.
- Meet with the current secretary to review any outstanding issues
- If you use MyLCI for reporting, create your account and review training materials
- Verify officer and membership information is correct on the club roster and at LCI and the MD/District level
- Work with the club president and treasurer on the annual budget and assist with setting up any committees





On a monthly basis, you will:

Monthly

- Attend club and board meetings
- Submit Monthly Membership Reports
- Submit Activities Report
- Keep member records up-to-date
- Collect and turn monies over to the club treasurer and obtain receipt
- Respond to/send out any letters or correspondence





On a quarterly basis, you will:

Quarterly

- Attend zone meeting with the club president
- Report to the president and board any delinquency issues and actions taken to collect funds due





Twice yearly, you will:

Bi-Annually

- Confirm list of members with LCI against the bi-annual dues list that is sent to the treasurer with the club records
- Work with club treasurer to issue semiannual dues statements to each member and reconcile other financial obligations owed to the club (your club may choose to do this quarterly or annually)





As needed, you will:

As Needed

- Review completed new membership applications and file in club records
- Submit new member information to LCI
- Order club supplies and awards through LCI or local vendor





After the annual election, you will:

Election Time

- Submit Club Officer Report (PU-101)
- Receive and distribute information about MD/District and International Conventions
- Apply to LCI and District for member's awards



Planning your Term



You have reached the end of your term as club secretary. You will still play an important role in the future success of the club by planning for an effective transition.

End of Term

- Check records for 100% attendance and 'years of service' awards
- Make new attendance record form for the coming year
- Prepare annual report of activities, donations, hours, etc., for the year-end banquet or meeting
- Confirm all club files are up-to-date and ready for transfer to incoming club secretary
- Meet with incoming club secretary and review records and outstanding issues.



Planning your Term



What goals do you hope to achieve during your term as club secretary?

List these on page 13 in your workbook.



Planning your Term



Before we finish...

The Lions Learning Center offers free online courses to assist members with leadership development.

Additional Resources

Consider taking the following online courses:

- ☐ Writing Your Personal Mission Statement
- ☐ Goal Setting
- ☐ Managing Change

More information about the Lions Learning Center can be found here.





Welcome to Section 5:

Resources

Please turn to page 14 of your workbook.





There is much to remember as you begin
your term as club secretary

At any time, you can review this entire
presentation or return to a specific section.





You can gain additional insight and information by familiarizing yourself with the documents and training material on the following webpages.

Webpages:

MyLCI



Club Officers



The Club Resource Center



The Lions Learning Center



Lions Clubs Member Resources



Managing a Club





MyLion tutorial

MyLion Training



MyLCI video tutorials :

MyLCI Introduction



Using the MyLCI website



Publications:

Constitutions and By-Laws



LA-1 – International

LA-2 – Standard Club

LA-4 – District

Club Management Resources



Art of Recognition



Blueprint for a Stronger Club





Have we met our objectives?

In this online module we have:

- ✓ Examined the purpose of your club and the important position clubs hold within the structure of Lions Clubs International
- ✓ Summarized the many responsibilities you have as club secretary
- ✓ Provided links to additional resources you may need





Congratulations on completing the first part of your
Club Secretary Training.



Your next step will be to complete club secretary training at
your district level. Here you will gain additional information
and discuss club officer teamwork, setting goals and creating
action plans.





Thank you for participating!

If you have any questions, please contact your
District 27-D1 Global Action Team:

GLT Lion Tony Sobczak tonysobczak@yahoo.com

GMT Lion Adam Crowson adam.crowson@gmail.com

GST Lion Bruce Voight bfvoight@gmail.com

Or

Leadership@Lionsclubs.org

