

CLUB SECRETARY TRAINING

DISTRICT 11-B1

SEPTEMBER 2021

CLUB SECRETARY RESPONSIBILITIES

- **Organize club and board meetings**
- **Attend all club and board meetings**
- **Prepare agendas for and record minutes at every meeting**
- **Keep club records and receive correspondence**
- **Complete and file all club reports**
- **Engage as an active member of the District Governor's Advisory Committee of the Zone**

BEFORE THE MEETING

- **Meeting Notices** - provide members with advance notice of meeting dates/times
- **Meeting Agendas** - work with the president to create meeting agendas
- **Correspondence** - assemble any correspondence to give to appropriate chairpersons or member
- **Awards and member kits** - prepare awards and new member kits if necessary
- **Club Roster** - take attendance at meetings, keep roster up to date in MyLCI

DURING THE MEETING

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

AFTER THE MEETING

- **Record attendance**
- **Record awards presented**
- **Assist treasurer with dues processing upon request**
- **File/distribute a copy of the meeting minutes after they are approved**
- **Follow up - receive new membership applications from club membership chairperson and present to board for approval (some clubs vote as a whole for approval)**

BOARD MEETINGS, PART I

- **Coordinate topics to be covered and create the agenda, at the request of the president**
- **Notify board members and individual committee chairpersons of the meeting's time and location**
- **Prepare to record the meeting minutes in detail to provide a business history of the club**
- **Understand that these responsibilities vary from club to club; establish ground rules with the president to avoid confusion**


BOARD MEETINGS, PART 2

- **Note: Remember that secretaries' responsibilities vary according to regional practices and established club procedures. Adapt these suggestions to fit your club's needs. The '*Your Club, Your Way*' guide can help your club determine the kind of meeting that works best for your members.**
- **For more information, see the “Monthly Tasks” section in the Club Secretary e-Book**

RECORDING MINUTES, PART I

- **Have the outgoing secretary review his/her format for taking minutes with you.**

Typically, information to record includes...

- **Type of meeting (regular, special, or board)**
 - **Date and place of meeting**
 - **Name of person presiding over meeting**
 - **Whether previous meeting minutes were approved (usually a motion)**
 - **If a motion carries or is lost/denied**
- 

RECORDING MINUTES, PART 2

- **All points of order and appeals and whether they were sustained or lost**
- **Time the meeting was called to order and adjourned**
- **Names of Board members (for board meetings)**
- **Minutes are meant to record what the club does and NOT what members say during the meeting. Therefore any debate or discussion is considered informal and not recorded, although general points pertinent to passing or turning down a motion might explain why said action was taken.**
- **Proper terminology and form are important when recording minutes. You can find more information in “Robert's Rules of Order”.**

CLUB RECORDS

- **One of the most important responsibilities of a club secretary is keeping club records. As the secretary, keep the following club files accurate and up to date:**
 - The club charter
 - The constitution and by-laws (or use the District constitution and by-laws)
 - The club history
 - The minutes of all club and board of directors' meetings (i.e. minutes show expenditures were authorized)
 - Annual reports of club officers and committees
 - Activity and service reports (coordinate with club service chairperson)
 - Roster of club members

CORRESPONDENCE, PART I

- **The secretary receives a lot of information, from Lions Clubs International and other sources, pertaining to training, events, and meetings.**
- **Correspondence may come electronically or by mail and involve the president, treasurer, committee and/or project chairpersons. Open, read, and distribute in a timely manner.**
- **Discuss with the president how correspondence will be answered, kept, and reported.**

CORRESPONDENCE, PART 2

- **In some clubs, the secretary puts out a club newsletter (can be electronic), and submits articles to local news media or on a club online website or Facebook type page (public relations).**
- **Publicity ideas are available at www.lionsclubs.org.**
- **Always answer who, what, when, where, and why. If you are not directly responsible for these duties, stay in close contact with those who are to facilitate communication of club news. This can be a separate job by your club Marketing Communications chairperson.**

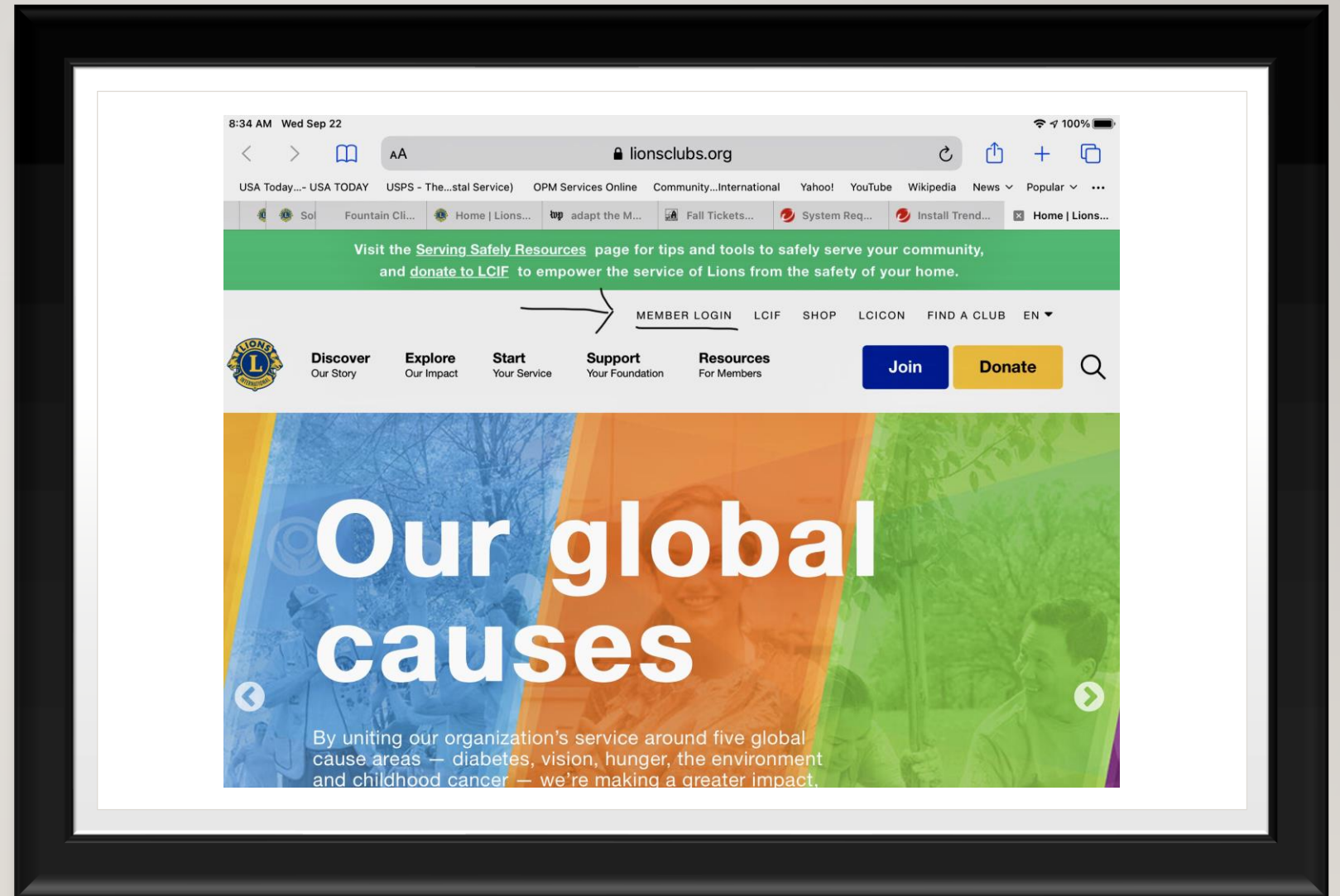
CLUB REPORTS

- **It is important to submit accurate and timely reports. Some of the reports for which you are responsible are:**
 - **Monthly membership report (MyLCI) – see Addendum for instructions**
 - **Club officer report (MyLCI after elections in April) - see Addendum**
 - **Club supplies order - (the store/Shop section on www.lionsclubs.org) - with prior approval of the president, board or club**
 - **Collaborate with the club service chairperson via meeting minutes or a list to create the service activities report, or record the activities on MyLion as the secretary**

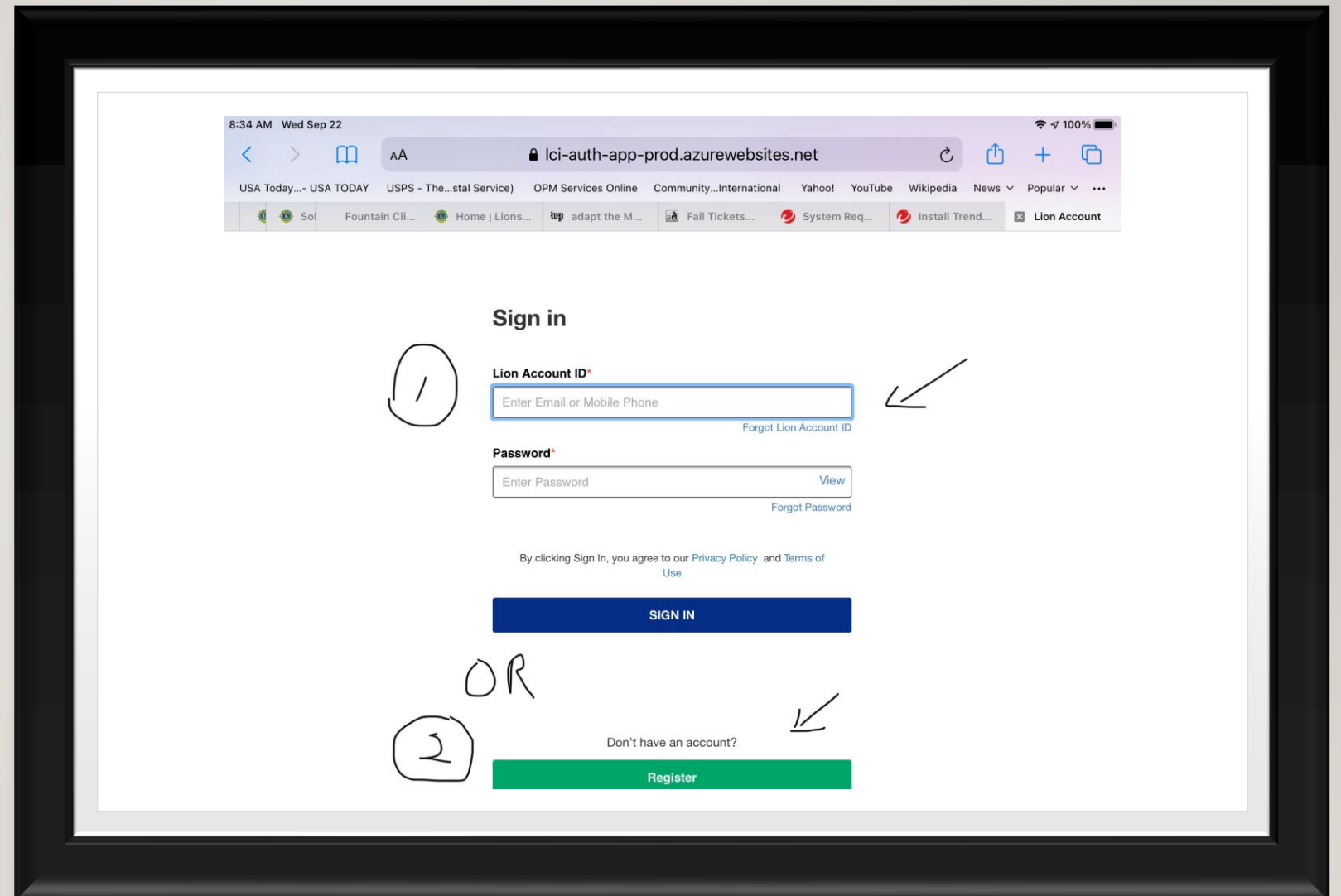
MANAGE MEMBERSHIP AND PRINT REPORTS ON MYLCI

- **Use MyLCI to update the roster and download rosters and reports.**
- **Submit monthly membership (add or drop members, or report “no change for the month” - (see addendum slide)**
- **View, update and download club information or print membership cards**
- **Provide treasurer with roster so he/she can invoice membership dues.**

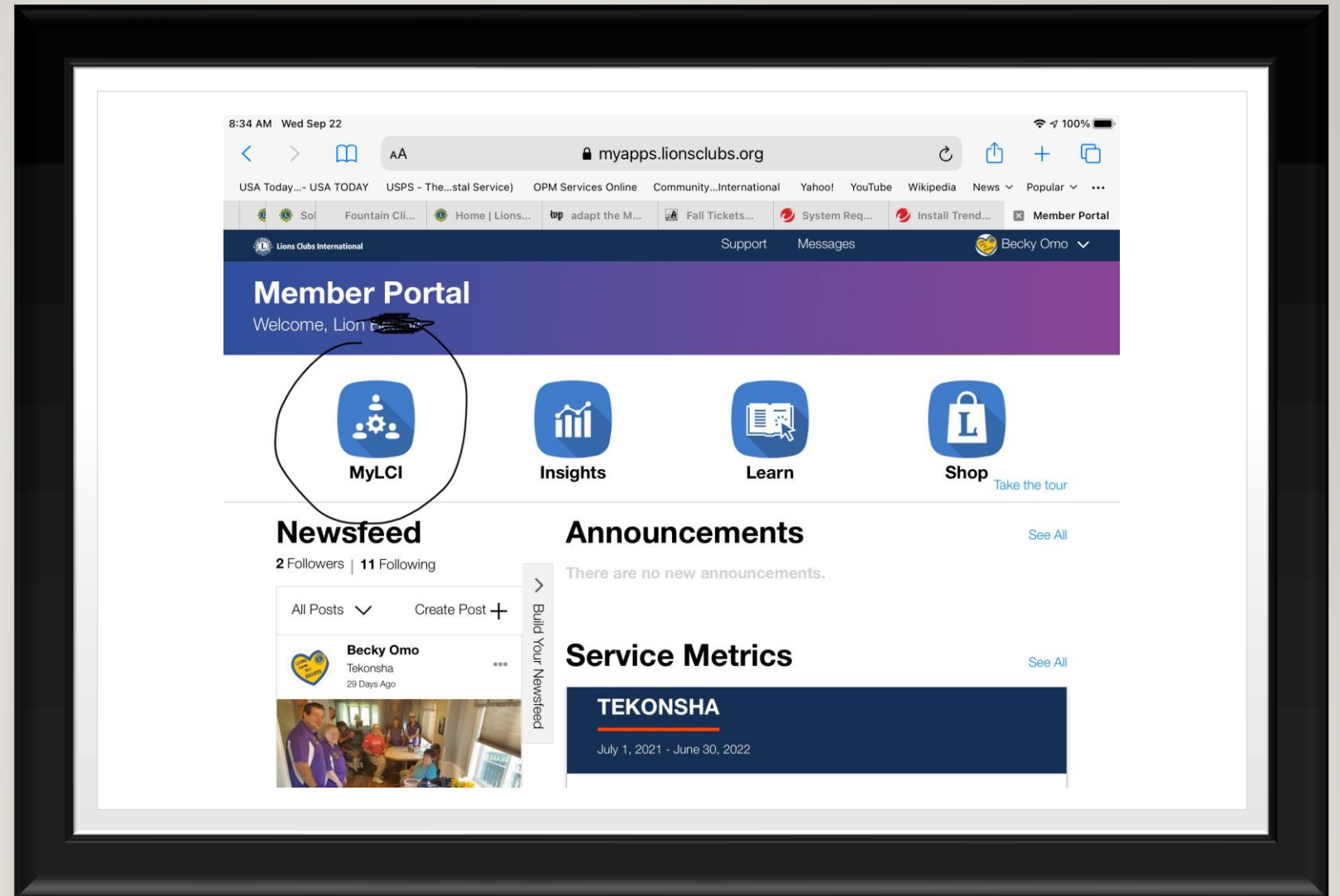
MEMBER LOGIN



LOGIN SCREEN



MYLCI PORTAL



MYLCI HOMEPAGE

8:36 AM Wed Sep 22

mylci.lionsclubs.org

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Home | Lions... adapt the M... Fall Tickets... System Req... Install Trend... MyLCI - Home

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MyLCI

Home My Lions Club My District My Multiple District

TEKONSHA (4591) - District 11 B1 - MI UNITED STATES

Home

My Tasks

Enter current year's officers.

My Club

TEKONSHA (4591)
founded in 1944

Meeting
Every 3rd Monday at 18:00

Tekonsha First Baptist Church
914 N Main St
Tekonsha, MI 49092

club website
[http://www.Search \"Tekonsha Lions Club\" on Facebook](http://www.Search \)

Club Specialty
Cause-Specific - Other-Wellness and health

My Info

2021 - 2022 Club President
Becky S Orno (4466895)

Club
TEKONSHA (4591)

Member Correspondence Address
373 E Girard Rd
Coldwater, MI 49036

Officer Correspondence Address
373 E Girard Rd
Coldwater, MI 49036

Home 1 517 781-0358
E-mail nanasbabes05@gmail.com

My Members

Membership Reporting Status

Month	J	A	S	O	N	D	J	F	M	A	M	J
Reported	✓	✓	✓									

Membership Summary

My Service Activities

Reminder: Service Activity support in MyLCI ends with Fiscal Year 2018-2019. For 2019-2020 Service Activities, use MyLCI.

My Officers

District Governor
Terri Huffman

Cabinet Secretary
Barbara A Rav

MYLCI MY CLUB

8:36 AM Wed Sep 22

mylci.lionsclubs.org

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MyLCI

Home My Lions Club My District My Multiple District

Members Club Info Officers Conventions New Club Applications Statements/ Dues Service Activities Signature Service Activities Reports Data Download Membership Cards

UNITED STATES

My Club
TEKONSHA (4591)
founded in 1944
Meeting
Every 3rd Monday at 18:00
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Tekonsha, MI 49092
club website
http://www.Search "Tekonsha Lions Club" on Facebook
Club Specialty
Cause-Specific - Other-Wellness and health

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Officer Correspondence Address
373 E Girard Rd
Coldwater, MI 49036
Home 1 517 781-0358
E-mail nanasbabes05@gmail.com

My Members
Membership Reporting Status
Month J A S O N D J F M A M J
Reported ✓ ✓ ✓
Membersin Summary

My Service Activities
Reminder: Service Activity support in MyLCI ends with Fiscal Year 2018-2019. For 2019-2020 Service Activities, use MyLion.

My Officers
District Governor
Terri Huffman
Cabinet Secretary
Barbara A Rav

MYLCI MEMBERSHIP

8:36 AM Wed Sep 22

100%

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MyLCI Support

Home My Lions Club My District My Multiple District

TEKONSHA (4591) - District 11 B1 - MI UNITED STATES

Members

Add Member Report No Changes for Month Find Members

Active Members - 25

July 2024
August 2024
September 2024

Mr. Michael Axford Regular Member Added 9/17/2018

Sort by Last Name

MYLCI REPORTS

8:37 AM Wed Sep 22

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Return to your Lion Account Club President Message Center My Profile Logout Announcements Support

My Lions Club My District My Multiple District

TEKONSHA (4591) - District 11 B1 - MI UNITED STATES

Reports

Available Reports

- Club Attendance Sheet
- Club Monthly Reporting History
- Monthly Membership Report - Detail
- Club Roster
- Club Roster of Membership Data
- Family Unit Report
- MyLCI Monthly Service Activity Report
- Lions Club Contact List
- Lions Club Officer Report for Current Year
- Lions Club Officer Report for Next Year
- Lions District Officer Contact List
- Member Information Update Report
- Club Achievements

Report Information

Select a report from the list on the left.

Download Excel View/Print

ZONE MEETINGS (DG ADVISORY COMMITTEE)

- **Zone Meetings are now called District Governor Advisory Committee Meetings**
- **This committee includes the zone chairperson, club presidents, first vice presidents, and club secretaries within the zone; the club membership or service chairpersons within the zone are optionally included.**
- **This committee advises the zone chairperson about matters within the zone and makes recommendations on matters affecting all clubs in the District.**

ZONE MEETINGS, PART 2

- **Work with the zone chairperson on club policies and procedures through any training provided.**
- **Attend zone meetings, training forums, and the district convention.**
- **Share best practices about secretarial duties with other secretaries in the zone.**
- **Promote various club functions and events (officer or new member inductions, awards given, activities/events etc.)**
- **Prepare and give a report of club activities at zone meetings.**
- **Assist with preparation if your club hosts a zone meeting.**

ZONE MEETINGS, PART 3

- **The benefits of attending these 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**
- **See the “Model District Governor's Advisory Committee Meetings” publication on the LCI website**


SUCCESSION PLANNING

- **Once you complete your term of office, continue your club's success by planning for an effective transition.**
- **Review format for taking minutes with incoming secretary.**
- **Keep the roster up to date when a member's information changes.**
- **Print the membership reports for the incoming secretary.**

PREPARE TO BE SECRETARY

- **Keeping track of your responsibilities as club secretary can be challenging.**

To prepare:

- **Attend local club officer training**
 - **Meet with the current secretary to review any outstanding issues**
 - **Create your MyLCI account and review training materials for using it**
 - **Verify officer membership information (address, phone, email) is correct on the club roster in MyLCI (date of birth is required now for all members)**
 - **Work with the club president and treasurer in budget planning and setting up any committees**
- 

SUMMARY: DUTIES

- **Prepare for and attend programs and meetings**
- **Maintain club business records, minutes, and reports**
- **Manage correspondence**

SUMMARY: DUTIES...

- Report membership changes on MyLCI (add and drop members timely so the club is not paying dues for someone who is no longer a member due to resignation or not paying dues)
- Report past and future club activities in MyLion (Service project, Fundraiser, Meetings, Donations)
- Correspond with the District requests

SUMMARY: DUTIES....

- **Attend zone meetings**
- **Update member roster on MyLCI prior to dues invoicing (semi-annual or annually)**
- **Work with treasurer to report any delinquency issues and actions taken to collect funds that are due**
- **Review completed new membership applications and file in club records**

SUMMARY: DUTIES.....

- **Submit new member information in MyLCI**
- **Order club supplies and awards through the LCI online store with President's approval**
- **Submit club officer report after elections in April (on MyLCI) – see Addendum for instructions**

SUMMARY: DUTIES.....

- **Receive and distribute information about district, state, and international conventions**
- **Apply for awards that are printed in the District roster and awards from LCI**
- **Ensure smooth transition for incoming secretary when your term ends**

ADDENDUM: REPORT OFFICERS, PART I

- Log in at lionsclubs.org. Choose MyLCI
- From the "My Lions Club" menu, select "Officers"



ADDENDUM: REPORT OFFICERS, PART 2

- Click on the "Select Term" button and choose "Next Year"



The screenshot shows a web form titled "Officers" with a Lions Club logo. Below the title are three input fields: "Select Term" (a dropdown menu), "Officer Type" (a dropdown menu), and "Add Local Title" (a text input field). The "Select Term" dropdown menu is open, showing three options: "Current Year", "Next Year" (which is highlighted in blue), and "Past Years".

ADDENDUM: REPORT OFFICERS, PART 3

- For each of the fields (or at least President, Secretary, and Treasurer), use the "Add Officer" button on the right.

ANN ARBOR EVENING (4421) - District 11 B1 - MI UNITED STATES

 Officers

Select Term ▼ Officer Type ▼ Add Local Title

Next Year - Lions Club Officers - 10 title(s) found

Show 30 ▼ Page 1 of 1 Sort by Rank ▼ ▼ ◀ ▶

 Club President	Vacant
--	--------

This position is currently vacant.

[Add Officer](#)

ADDENDUM: REPORT OFFICERS, PART 4

- A dialog box will open. Click the "Select Member" button.
- Click on a club member's name and then click "Save".
- The screen will display a confirmation message.
- Click "Go Back to Officers" at the bottom of the screen.
- Repeat for each of the positions.

ADDENDUM: MONTHLY MEMBERSHIP REPORT, PT I

- **At lionsclubs.org, choose “Member Login”**
- **Once logged in, choose “MyLCI”**
- **Click on the "My Lions Club" menu then select “Members”**
- **On the “Members” screen, you can easily file the monthly membership report**

ADDENDUM: MONTHLY MEMBERSHIP REPORT, PT 2

- Add, delete, or update member information
- Or simply report “No Change”



THANK YOU,
SECRETARIES!



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Q & A

- More help: Complete the *Club Secretary Responsibilities* and the *Club Secretary Learning Path* modules in the Lions Learning Center at www.lionsclubs.org. The Robert's Rules of Order parliamentary procedure is the final section in that module.
- **DISCUSSION**
- **Q & A**