



## **Club Secretary Training**

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**Spring, 2015**

## **Oath of Office Duties of the Club Secretary**

Lion Club Secretary,

You have been elected to serve your club as secretary. Yours is one of the most important offices in the club. The success of your club will be determined largely by the efficiency with which you perform the duties of your office. You are the president's right hand. Under the president's direction and that of the board of directors, you are the liaison officer between your club and Lions Clubs International and between your club and your district governor's organization.

You will receive many communications from both. Through you, in the post of corresponding officer, it will be your duty to see that all communications are properly referred to your board of directors or your club as circumstances require or justify.

Among your duties as provided in the Lions Clubs International Constitution and By-laws, you shall submit regular Monthly Membership Reports and Activities Reports to Lions Clubs International, with copies to our district governor and vice district governors.

You shall keep the general club records, including minutes of club and board meetings, committee appointments, officers' list, attendance records, list of key members and list of members showing their classifications, addresses and telephone numbers.

You shall collect from the members, and others, all monies due the club, turning such funds over to the treasurer, taking proper receipt. You shall furnish a financial statement to the board of directors monthly, to the club quarterly, and to Lions Clubs International semi-annually.

As part of your monthly report to the board, you shall include the names of all members who are in arrears in payment of dues and those who have absented themselves beyond the attendance requirement provided in the Constitution and By-laws.

You are also an active member of the district governor's advisory committee and as such you are expected to attend the quarterly advisory committee meetings of your zone. You will receive pertinent information from Lions Clubs International intended to aid you in properly performing the duties of your office. Will you, as secretary, perform such duties to the best of your ability?"

Secretary: "I will."

## **Your Club Officers Manual**

The Club Officers Team Manual is a 39-page document covering essential information, club structure, the duties of all club officers and the operation and management of the local Lions Club.

### **To Obtain your Club Officers Team Manual**

Log onto the LCI Website—[www.lionsclubs.org](http://www.lionsclubs.org)

In the search window, enter LA-15 or Club Officers Team Manual

Click on search or return and then click on Club Officers Manual

### **Introduction (Taken from page 5 of the Club Officers Team Manual)**

Congratulations! Serving as a club officer is a privilege and honor bestowed upon you by club members. Through your election, your peers have recognized your leadership skills and potential to manage the club effectively. Your term in office will offer many opportunities to learn new skills, enhance the experience of others and grow as a leader. By taking advantage of the many opportunities to learn and grow, your term can have personal and professional development benefits that will last a lifetime.

### **Duties of the Club Secretary (Taken from pages 7 and 8 of the Club Officers Team Manual)**

He/she is under the supervision and direction of the president and the board of directors, and is the liaison officer between the club and the district (single or sub and multiple) in which the club is located, and the association.

The secretary:

- Submits regular monthly membership reports, service activity reports and other reports specified by the association
- Submits reports upon request to the district governor's cabinet
- Cooperates with and serves as an active member of the district governor's advisory committee of the zone in which the club is located
- Has custody of and maintains general records of the club, including minutes of club and board meetings; attendance; committee appointments; elections; member information, addresses and telephone numbers of members; members club accounts
- Arranges for issuance, in cooperation with the treasurer, of quarterly or semi-annual statements to each member for dues and other financial obligations owed to the club, collects and turns dues over to the club treasurer and obtains a receipt
- Gives bond for the faithful discharge of his/her office in the sum and with surety as determined by the board of directors
- Delivers in a timely manner, at the end of his/her term, the general records of the club to successor.

## **Areas on the LCI Web Site Under My Lions Club Found After Logging in on MyLCI**

**Members**—This is where you can get a list of your club's current members and prepare the Monthly Membership Report (MMR).

**New Club Applications**—To be used in starting a new club.

**Club Info**—This is where you can update the information about the time and place where your club meets.

**Officers**—This is where you can find and update your club officers.

**Statements/Dues**—This is where you can find your financial account information with LCI.

**Service Activities**—This is where you can view, add and edit your club's activities.

**Signature Service Activities**—This is where you can view, add and edit you club's Signature Service Activity.

**Service Activity Goals**—This is where you can view, add and edit your club's goals.

**Reports**—Clicking here will lead you to a second page of the reports for your club.

Included are:

Club Attendance Sheet

Club Monthly Reporting History

Monthly Membership Report - Detail

Club Roster

Club Roster of Membership Data

Family Unit Report

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

**Membership Cards**—This is where you can make membership cards for your club's members

## Filing Form 990-N with the IRS

If you are filing or assisting someone who is filing, you will need the organization's employer identification number (EIN).

Log onto [www.epostcard.form990.org](http://www.epostcard.form990.org)

Follow the instructions.

### **Remember, YOU are the KEY to your club's success!**

You are the liaison between your club and the district and Lions Clubs International.

You are the communications hub for your club:

monthly membership reports, monthly service activities reports, all meeting minutes

Tips for meeting minutes:

record type of meeting, date, place

First and last name of person presiding, time called to order & adjourned

First and last name and titles for guests.

First and last name of members who made & 2nd motions

Action on motions (only motions are recorded: debates/discussions not recorded)

Remember, this is a PERMANENT, LEGAL RECORD

Back up your files if you are keeping them electronically.

Keep club's Permanent files including: club charter, club constitution/by-laws, club history, minutes of club/board of directors meetings, annual reports, including IRS Form 990N, membership reports & activity reports, roster of members w/address, phone, year joined, etc.

Attend zone meetings.

Help club president compile all agendas

Receive & respond to all club correspondence, promptly and professionally.

Work with club webmaster to ensure club's website is maintained and current.

Order club supplies & awards.

Provide advance notice of meetings to all members via electronic or mail notice.

Have new member kits available.

Tips on MyLCI:

system will log you out after 20 minutes, so *ALWAYS SAVE YOUR WORK*.

**Remember to always click "SHARE" on every Service Activity you enter**, otherwise district leaders and LCI can't see your activity.

To get help from LCI: [mylci@lionsclubs.org](mailto:mylci@lionsclubs.org) or phone 630-468-6900 from 8:30 to 4:30 p.m.

**Additional LCI References available online** at [www.lionsclubs.org](http://www.lionsclubs.org):

Publications: Club Officer Team Manual, Art of Recognition, Constitution and By-Laws

MyLCI video tutorials under blue Support Panel: MyLCI Introduction; Using the MyLCI website

**Lions Learning Center**: [www.lionsclub.org](http://www.lionsclub.org) - click member center - click leadership development

Introductions to Lions Leadership, Effective Listening, Public Speaking, Public Relations, Meeting Management, Personal Mission Statement, Goal Setting, Managing Change.

## **Reporting Monthly Membership Reports On Line**

1. Log onto MyLCI.org

2. Enter your User Name and Password.

If you have not established a User Name and Password, you need to click on “New User? Click here to register now” and follow the steps given.

3. Click on Submit.

4. You have a choice to make, click on Enter Membership for the Current Month or click on Report “No membership changes” for the current month.

5. If you click on Report “No membership changes”, click on Report.

6. The next page that comes up confirms no member transaction for the current month.

7. If you click on Enter Membership for the Current Month, it will take you to a list of your club’s membership. Here you can click on Add Member or Report No Changes for Month.

8. If you click on Add Member, you will need to make a choice of New Member, Returning Member or Transfer Member.

9. Complete the requested information and click on Save.

10. To update a member’s information, scroll to the member, click on Edit Member, enter the information that needs updated and then click on Save.

11. To drop a member, scroll to the member, click on Drop Member, enter the requested information and click on Drop.

12. If you have completed steps 1 through 11 earlier in the month and desire to make additional changes to membership during the month, there is a different method to get to this area. Click on my Lions Club and then click on Members. You are now ready to make additional changes in membership by following steps 8 through 11.

13. To review the MMR you have just created and make copies of the MMR, click on My Lions Club, then click on reports, click on Monthly Membership Report-Detail, enter the Report Year and Report Month and then click on View/Print. This report can be printed for your records or to mail to other district officers.

## Reporting Lions Club Service Activity Report on Line

1. Log onto MyLCI.org

2. Enter your User Name and Password.

If you have not established a User Name and Password, you need to click on “New User? Click here to register now” and follow the steps given.

3. Click on Submit.

4. Click on Enter Service Activities including Centennial Service Challenge Activities for the Current Month.

**Or**

4. Click on My Lions Club.

Click on Service Activities.

5. Click on Add Activity.

6. Complete the Basic Activity Information & Detailed Activity Information.

Select the month and year for the desired report.

Enter the Activity Type by Clicking on Select Type and Scrolling to find the type.

Enter the Activity Title (name of the activity).

Enter an Activity Description if desired.

Complete the requested items.

7. Click on Save.

8. You now have a choice by clicking on Go Back to Service Activities, Add Another Service Activity or Go To Home Page.

9. To print the report, click on Go Back to Service Activities and then click on View/Print.

10. Here is the finished report, “My Service Activities”.

11. After step #4, you can also Edit the Activity or Delete the Activity by clicking on the items on the right hand side of the activity.

## **Reporting Club Officers On Line for Next Year**

1. Log onto MyLCI.org
2. Enter your User Name and Password
3. Click on Submit
4. Click on Enter Current Year's Officers

### **OR**

4. Click on My Lions Club
5. Click on Officers. Here you will see the club officers for the current year.
6. Click on Select Term and Next Year
7. Select the Office Title that you desire to report to LCI and click on Add Officers
8. Click on Select Member, scroll down and click on the member to serve in this position.
9. Enter Save.
10. Repeat steps 10, 11 and 12 for each office being reported.
11. To review the PU101, click on My Lions Club, then click on Reports, then click on Lion Clubs Officer Report for Next Year and then click on View/Print.
12. This report can be printed for your records or to mail to other district or state officers.
13. If you need to change an officer during the year, you will need to click on My Lions Club and click on Officers. Then you will need to click on End Officer Term and Click on End Term. After ending the term of the officer, you will need to add the new officer following steps 4 through 9.