

# CLT – Secretaries

## Quick recap

This training session focused on preparing new and existing club secretaries for their roles in Lions clubs. Ken Leja, council chair for Multiple District 21, and Linda Finley, cabinet secretary-treasurer for District 21-North, led the workshop covering the six main responsibilities of club secretaries: organizing meetings, preparing agendas and recording minutes, keeping club records, receiving and filing correspondence, completing reports, and serving on the District Governor's Advisory Committee. The session included detailed instruction on using the Lion Portal system, including how to manage membership data, report service activities, and handle administrative duties. Participants learned about reporting requirements, including the importance of updating officer information by May 15, and proper procedures for adding or dropping members. The training also covered communication protocols with emphasis on email as the primary method for club communications and the secretary's role as the gatekeeper for external communications. CST Linda demonstrated the Lion Portal on how to access and update club information, manage membership data, and report service activities through the portal system. Participants learned about the importance of accurate officer listings, proper member transfers between clubs, and the requirements for service reporting including travel time and administrative hours. The session also covered payment processes for club dues and insurance coverage for events.

## Key Take-Home Points

- [Complete the required Club Secretary training modules in the LCI Learn Center \(Club Secretary Learning Path and Responsibilities\) and achieve 100% to fulfill training requirements.](#)
- [Enter club officers for the upcoming year into the Lions Portal by May 15th deadline.](#)
- [Ensure club membership roster information \(names, emails, phone numbers\) is correct and up to date in the Lions Portal; distribute roster to club members for review and updates.](#)
- [Print and review the Membership Contact List report at the beginning of the year \(or end of previous year\) and verify all member information is correct.](#)
- [Ensure all club members who are attending convention are properly designated as delegates or alternates in the portal before the preregistration deadline.](#)
- [Maintain a separate record/section \(e.g., in a notebook or spreadsheet\) for motions involving spending or significant club decisions for easier reference.](#)

- [Coordinate with club treasurers to ensure dues are paid promptly upon receipt of billing, and monitor for new member billing after adding members; remind club treasurers to use correct payment methods to avoid late fees or loss of voting rights.](#)
- [Run and review the Club Roster Membership Data report to verify member status, awards, and contact information.](#)
- [Ensure service projects and administrative hours \(including travel and meeting time\) are entered and marked complete in the Lions Portal; verify all entries are marked as complete before LCI deadlines.](#)
- [Ensure that when processing member transfers, the member is properly dropped as a transfer by the home club before being added to the new club, and provide the member with their club name, number, and member number for the transfer process.](#)
- [Ensure that both secretaries and treasurers maintain and cross-check dues payment records for club members.](#)
- [Enter and/or update service activities and administrative meetings in the Lion Portal, including backdating any missing activities as needed.](#)
- [Print and distribute updated membership cards to club members, ensuring all required information is present \(optionally including club ID for donations\).](#)
- [If possible, keep both digital and hard copy records of minutes and club documents for as long as practical, especially for historical/anniversary reference.](#)
- [If applicable, enter local/backup officers \(e.g., second secretary\) as club directors with specific roles in the Lions Portal for local club records.](#)
- [If club admin access is not assigned, recommend assigning a knowledgeable member as club admin to support portal tasks.](#)
- [If applying for event insurance, submit requests via the online form in the Lions Portal resources section for upcoming events.](#)
- [For clubs updating constitutions and bylaws, download and review the current Standard Club Constitution from the Lions Clubs International Member Resource Center.](#)

## **Summary**

### **Secretary and Lion Portal Training Session**

This training session included the Lion Portal and focused on training new club secretaries and the role of the secretary as the primary resource for club information and questions, emphasizing their importance as the "heartbeat of the club." The session touched on the challenges of using the new Portal system compared to the previous MyLion website, particularly regarding member directory functionality, and covered the role and

responsibilities of club secretaries, including organizing meetings, taking minutes, and handling reports and records.

### **Club Secretary Responsibilities Overview**

CC Ken outlined the key responsibilities of a club secretary, which include organizing and attending meetings, preparing agendas, recording minutes, managing records, handling correspondence, and filing reports. He emphasized the importance of familiarizing oneself with the Lions Constitution and By-Laws, as well as utilizing the Club Secretary E-book as a primary resource for which he advised secretaries to download and store on their phones for easy access during meetings. He explained the club structure, highlighting the roles of the board of directors, executive officers, and the secretary's position within the club officer team by outlining such additional expectations as maintaining club records, handling correspondence, and managing communications, while emphasizing the importance of delegating tasks to other members when possible.

### **Lions Learning Center - Secretary**

Key requirements were outlined, including completing two specific modules in the Lions Learning Center (Club Officer Learning Path and Club Secretary Responsibilities) and accessing the Lion Portal. Also emphasized was the importance of having a club administrator with higher access permissions, particularly for clubs without an admin designated. The session also addressed technical issues with accessing the portal and learning center, with participants receiving guidance on navigation and required coursework completion.

### **Club Secretary Guidelines and Deadlines**

Kenneth discussed key deadlines and responsibilities for club secretaries, emphasizing that officer elections must be completed and reported by May 15th to avoid system congestion. He explained the role of the District Governor's Advisory Committee and recommended using the standard club constitution from Alliance Clubs International as a benchmark for updating local constitutions. Pat inquired about updating their club's constitution using the district constitution as a format, and Kenneth clarified that while the district constitution differs from club constitutions, the standard club constitution from Lions Clubs International could be used as a reference. The conversation ended with Kenneth preparing to hand over to Linda to discuss the Lion Portal.

### **Club Communication and Secretary Processes**

CST Linda explained the communication process for club information, stating that all communications from the district or state are sent via email to club officers. She emphasized the importance of checking spam folders regularly and acting as a gatekeeper to forward relevant information to the club.

## **Financial Management and Club Policies**

CST Linda discussed the secretary's role in financial management, emphasizing the importance of tracking and verifying treasurer responsibilities, including reviewing statements and ensuring bills are paid. She highlighted that clubs must pay their dues by the end of May to qualify for voting at state conventions and advised secretaries to remind officers to check emails and statements regularly. Linda also mentioned a new policy allowing secretaries, treasurers, presidents, and admins to make online payments using club debit cards or personal credit cards if necessary, provided they inform the treasurer beforehand.

## **Club Payment and Membership Procedures**

CST Linda explained the various payment methods for club dues, recommending credit cards for faster processing during voting season. She outlined the responsibilities of club secretaries, including managing member information accurately and ensuring correct roster updates. Linda emphasized the importance of properly reporting deceased members and maintaining up-to-date contact details. She also demonstrated how to use LCI's system to generate reports, including member contact lists and attendance records, and provided guidance on entering member information correctly.

## **Member Transfer Process Demonstration**

CST Linda demonstrated the process of handling member transfers in Lions Club management, explaining that the home club must first perform a "drop transfer" before a member can be added to a new club. She emphasized the importance of accurately recording transfer reasons, particularly for non-payment of dues, as this information affects the new club's decision to accept the member. The discussion revealed that transferred members need specific information including their new club name and membership details, as the portal cannot search for members across different states.

## **Membership Records and Delegate Process**

CST Linda discussed the importance of having accurate information when processing transfers and membership records, emphasizing the need for specific details like member names and club numbers. CST Linda provided guidance on managing membership contact lists and officer information in the LCI system, emphasizing the importance of updating officer details before May 15. She explained the process for adding, editing, and dropping members, including proper documentation for such changes as transfers or terminations. She explained the process for selecting delegates and alternates for the upcoming state convention, noting that only members attending the convention can be certified as delegates, and the deadline for submitting names is May 28th. Linda also highlighted changes in voting eligibility calculations, now based on full dues-paying members who have been in the club for a year and a day.

## **Membership Cards and Fundraising Policies**

CST Linda discussed membership cards and their importance for fundraising, noting that the club ID should be included on the cards for donation purposes. She explained the policy on semi-annual dues and emphasized the importance of paying invoices on receipt without waiting for a board meeting. She advised treasurers to be aware of due dates and to contact the cabinet treasurer if invoices are not received by the 15th of January or July.

## **Lions Portal System Training Demo**

CST Linda demonstrated how to use the online Lions Portal system, emphasizing the importance of bookmarking the portal and using the correct email address associated with Lions records. She explained the process for logging in, setting up an account, and managing permissions, including the updated policy allowing the president, secretary, treasurer, or admin to pay the LCI club bill online, as well as how to monitor club statements, view payment details, and access member information, including noticing delegate counts (updated the month before conventions), entering officer information and managing forms. She emphasized that all officers for the upcoming year must be entered into the system by May 15, and explained the difference between official officers (who receive LCI communications) and local officers (who are club-specific roles). Discussion included guidance on dating forms appropriately and using the system's export features.

## **Club Officer Change Process**

CST Linda discussed the process of changing club officers, explaining that current terms must be ended before new officers can be appointed. She demonstrated how to add officers in the system, emphasizing the importance of including addresses and setting appropriate start/end dates. She also showed how to use the membership data report to identify different membership types, including Melvin Jones Fellows and progressive members.

## **Service Reporting and Records Keeping**

CST Linda provided guidance on service reporting and maintaining records for club secretaries. She recommended keeping separate records of motions made for expenses to ensure proper tracking and history for future reference. Linda also explained how to properly log administrative time, including travel time for meetings and service projects, in the Lions service portal system.