



## Training Outline: Club Secretary

This training outline is designed for incoming Club Secretaries of the California/Nevada District Exchange Clubs. It aims to provide a comprehensive understanding of their administrative and communication responsibilities, ensuring accurate record-keeping and effective information flow within the club and with the broader Exchange organization.

### Module 1: Understanding the Club Secretary Role & Administrative Fundamentals

**Objective:** To provide a foundational understanding of the Club Secretary's position and their crucial role in club administration.

- **1.1. Role of the Club Secretary:**
  - Serving as the keeper of all club records.
  - Responsible for maintaining accurate documentation of club activities and decisions.
  - Facilitating effective communication within the club and with district/national levels.
- **1.2. Key Relationships:**
  - Collaboration with the Club President and Board of Directors.
  - Interaction with the Club Treasurer for financial record consistency and dues collection.
  - Understanding the reporting relationship to the District Secretary and National Headquarters.
- **1.3. Importance of Accurate Records:**
  - Ensuring transparency and continuity in club operations.
  - Providing historical data for planning and reporting.

### Module 2: Record Keeping and Meeting Minutes

**Objective:** To master the practices for maintaining accurate club records and producing comprehensive meeting minutes.

- **2.1. Maintaining Club Records:**
  - Properly maintaining all club documents and files.

- Organizing and archiving important club correspondence, reports, and official documents.
- **2.2. Recording Meeting Minutes:**
  - Accurately recording minutes of all club meetings.
  - Documenting key discussions, decisions, action items, and attendees.
  - Ensuring minutes are approved by the club board.
- **2.3. Dues Billing and Collection (Coordination with Treasurer):**
  - Promptly billing members for dues.
  - Coordinating with the Treasurer on the collection of dues and joining fees to ensure accurate membership records.

## **Module 3: Reporting and Communication Flow**

**Objective:** To effectively manage reporting requirements and facilitate robust communication channels.

- **3.1. Submitting Required Reports:**
  - Promptly submitting required reports/forms to the district and National Headquarters.
  - Utilizing the Exchange Club Member Website for online report submissions (e.g., Officer Election Report, Project reports, roster updates).
- **3.2. Club Publications:**
  - Ensuring a club publication is produced monthly for member communication.
  - Focusing the publication on club activities, goals, and promoting attendance.
- **3.3. Internal and External Communication:**
  - Managing club correspondence.
  - Supporting the club's public relations efforts by providing information for news releases and social media.
  - Ensuring club officers enter roster updates on the Exchange Club Member Website.

## **Module 4: Compliance and Best Practices**

**Objective:** To understand and adhere to organizational compliance standards and best administrative practices.

- **4.1. Club Standards:**
  - Understanding the "Club Standards List" and the Secretary's role in ensuring compliance (e.g., meeting frequency, business handled by board, records maintenance).
- **4.2. Officer Election Reporting:**
  - Ensuring new club officers are elected in March or April.

- Promptly entering upcoming officers in Exchange's database using the Officer Election Report button/form (before April 30).
- **4.3. Audit Support:**
  - Cooperating with the annual audit of the club's books and records (alongside the Treasurer).
- **4.4. New Member Integration:**
  - Confirming all new members joining were inducted, received new member orientation, and were able to log on the Exchange Club Member Website (before June 30).

## Module 5: Utilizing Technology and National Resources

**Objective:** To leverage available technology and national resources to enhance administrative efficiency.

- **5.1. Online Resources:**
  - Utilizing the Exchange Club Member Website for forms, reports, and educational materials.
  - Ensuring members and officers are logging into the website and accessing necessary resources.
- **5.2. Digital Tools:**
  - Considering digital form applications for collecting new member information (e.g., to create spreadsheets for database entry).
  - Embracing virtual communication for club and board meetings.
- **5.3. Collaboration with National Headquarters:**
  - Contacting National Headquarters (MemberServices@NationalExchangeClub.org) for assistance with club operations or member education.

### Resources for Club Secretaries:

- **Club Leadership Guide:** Provides guidance on club operations and officer duties.
- **Exchange Education Courses:** Specifically the "Club Secretary Orientation" course on the Exchange Club Member Website (completion by August 1 for awards).
- **Exchange Club Member Website:** Essential for forms, reports, roster management, and general resources.
- **National Headquarters Staff:** For questions, advice, and support on administrative matters.
- **Club President and Treasurer:** For seamless coordination of club management.

This outline provides a thorough guide for Club Secretaries to manage their club's administrative and communication responsibilities effectively and in compliance with all relevant guidelines.