



**Secretary**

# CLUB OFFICER TRAINING

**TOASTMASTERS INTERNATIONAL**

P.O. Box 9052 • Mission Viejo, CA 92690 • USA • Phone: +1 949-858-8255 • Fax: +1 949-858-1207

**[www.toastmasters.org/members](http://www.toastmasters.org/members)**

© 2014 Toastmasters International. All rights reserved. Toastmasters International, the Toastmasters International logo, and all other Toastmasters International trademarks and copyrights are the sole property of Toastmasters International and may be used only with permission.

Item 1313F  
Rev. 0' /201\*



# Table of Contents

<b>Prepare for Training</b>	<b>1</b>
Using the Facilitator Guide	3
<b>Secretary</b>	<b>7</b>
Introduction	9
Secretary Role	12
Activity: Secretary Role	14
Debrief: Secretary Role	15
Secretary Responsibilities	16
The Club Meeting	17
Outside the Club Meeting	19
The Executive Committee Meeting	21
Activity: How to Fulfill the Secretary Responsibilities	21
Debrief: Secretary Responsibilities	23
Secretary Resources	24
Debrief: Secretary Resources	26
Conclusion	27





# PREPARE FOR TRAINING

Welcome to Club Officer Training. As a training facilitator, you are responsible for conveying the information that club officers need to fulfill their roles. Well-trained club officers are equipped to enhance club quality, develop and lead successful teams and thrive in the Distinguished Club Program. All of these abilities contribute to fulfill the club mission.

Club officers dedicate valuable time and provide a tremendous service to Toastmasters. It is important that they understand the importance of their roles and know how appreciated they are.

While many club officers will be content, and even enthusiastic, about their new responsibilities, others may feel uncertain and obligated. Attending the training and fulfilling their roles implies great commitment deserving of recognition.

As a training facilitator, it's important not to overwhelm club officers. Be sure to impart to them that support is close at hand. Their fellow club officers, district leaders, and the staff at World Headquarters are all available and eager to assist them.

Each session in the Club Officer Training consists of a facilitator guide and a PowerPoint presentation.

## Facilitator Guide

This is a tool to guide the facilitator in teaching the session. Each session includes a corresponding facilitator guide. The facilitator should print him or herself a copy of the facilitator guide for each session.

## PowerPoint Presentation

This is to be presented by the facilitator during the session. There is one presentation for each session. The facilitator downloads the presentation to his or her laptop before the training and makes sure to have a projector and screen available during the session. The PowerPoint slides correspond to instructions in the facilitator guide.

## Facilitator Preparation

Before the training, review *From Speaker to Trainer* (Item 257A) for instructions about presenting, especially if you are new to facilitating training sessions.

Learn about the location where the training takes place. Determine the best way to set up the room, and confirm the equipment that is available there.

Communicate with participants well in advance. Make sure they know what to expect — where to go, what to bring, how long sessions last, and so on. Send reminders as the training date nears.

Visit the Logos, Images and Templates page at [www.toastmasters.org/resources/logos-images-and-templates](http://www.toastmasters.org/resources/logos-images-and-templates) for templates to create professional-looking agendas, training invitations, name cards, and other material for the sessions.

# USING THE FACILITATOR GUIDE

The facilitator guide is designed to be easy to use with detailed instructions. Nonetheless, be personable; it's okay to add your own anecdotes to the sessions and share what is unique in your district.

The facilitator guide of each session is organized the same way:

- The introduction begins with an explanation of the session.
- An overview lists the topics presented in the session.
- Objectives are what the club officers will be able to do as a result of attending the session.
- The materials you need to conduct the session are listed after the objectives.
- The length of time it should take you to conduct the session is suggested under the heading Duration.
- Beginning with the title of the first section, the guide presents a series of step-by-step instructions telling you exactly how to conduct the session.
- Throughout the guide, notes to the facilitator provide you with information to help you understand the purpose of the subsequent section or activity. By understanding what club officers are meant to learn, you can more easily guide discussions and answer questions.
- The outside margins provide space for you to take notes.

## Verbs

To help the facilitator refer to the guide at a glance, a limited number of verbs are used to begin each of the numbered steps in the sessions:

1. **SHOW:** to present a visual aid
2. **PRESENT:** to impart knowledge pertinent to session objectives
3. **TELL:** to offer information not directly relevant to session objectives
4. **ASK:** to request actual answers from participants (At times, the question is followed by possible answers. Give participants an opportunity to offer answers; then share any that weren't covered.)
5. **INSTRUCT:** to tell participants to do something
6. **TIME:** to keep track of time
7. **WRITE:** to record ideas so they are visible to participants
8. **DISCUSS:** to facilitate a conversation among the group

## Icons

The following icons appear in the margins throughout the facilitator guide to indicate specific actions the facilitator takes at that step:



Show a visual aid.



Ask questions.



Write on a flipchart.



Instruct participants to work in small groups.



10 minutes

Track time.

## Bullet Points

Color-coded bullet points in the facilitator guide also help you stay on track:

- Session objectives and materials are listed in the overview of each session with yellow bullet points.
- Light blue bullet points indicate content-related information to share with participants.
- Questions are posed using navy blue bullet points.
  - At times, questions are followed by possible answers. Give participants an opportunity to offer answers; then share any that weren't covered.





# Secretary

## NOTE TO FACILITATOR

During this session, you will present content, lead brief discussions and coordinate two activities to familiarize secretaries with their role and responsibilities.

First, you will present the role and use an activity to encourage participants to reflect on how the secretary supports the club mission.

Second, you will present specific responsibilities of the secretary in the club meeting, outside the club meeting and on the executive committee. Then, you will lead an activity to help secretaries prioritize their duties.

Third, you will present participants with a checklist to help them get started in their role.

## Introduction

The purpose of this session is to help secretaries understand their role in the Toastmasters club.

## Overview

First, secretaries learn about their role within the club. Then, they identify the responsibilities of their role within club meetings and club executive committee meetings. To conclude, secretaries find specific resources to help them fulfill their responsibilities.

In this session, facilitators present the following topics:

- Secretary Role
- Secretary Responsibilities
- Secretary Resources

## Objectives

After completing this session, secretaries will be able to:

- Identify their role within the club
- Fulfill their responsibilities within the club and club executive committee
- Find resources that help them fulfill their responsibilities

## Materials

- PowerPoint
- Flipchart
- Markers

## Time

- 1 hour

## Facilitator Resources

- [\*Club Leadership Handbook \(Item 222\)\*](#)

# Introduction

## NOTE TO FACILITATOR

When you introduce yourself, be sure to mention your background in Toastmasters. Highlight the awards you've received, how long you've been a member and what club officer roles you've served.

If someone asks you a question and you don't know the answer, send the question back to the group. Try asking, "What do you all think?" or "Does anyone have insight on this issue?" Club officers who have served before are great resources.

1. SHOW the Introduction slide.



## Secretary

Club Officer Training



2. PRESENT

- Congratulations on your election to secretary! In this position, you facilitate the smooth operation of the club by maintaining vital records. You maintain the club's written history so that future club officers will have this important information.

## NOTE TO FACILITATOR

Make an effort to vary your tone of voice when reading information off of slides.



3. SHOW the Session Agenda slide.

## Agenda

The slide features a dark blue header with the word "Agenda". Below the header are three sections, each with a small photo and a red arrow pointing right:

- ▶ Secretary Role
- ▶ Secretary Responsibilities
- ▶ Secretary Resources

A red pen icon with the word "CHECKLIST" written diagonally is positioned above the third section. At the bottom left is the website "www.toastmasters.org" and at the bottom right is the Toastmasters logo.

4. PRESENT the session agenda:

- Secretary Role
- Secretary Responsibilities
- Secretary Resources



5. SHOW the Session Objectives slide.

## Session Objectives

The slide features a dark blue header with the words "Session Objectives". Below the header is a list of three objectives, each with a blue arrow pointing right:

- ▶ Identify your role
- ▶ Fulfill your responsibilities
- ▶ Find resources that help you

To the right of the text is a red and white 3D-style dartboard with three blue darts hitting the bullseye. At the bottom left is the website "www.toastmasters.org" and at the bottom right is the Toastmasters logo.

6. PRESENT the session objectives:

- After completing this session, you will be able to:
  - Identify your role within the club

- Fulfill your responsibilities within the club and club executive committee
- Find resources that help you fulfill your responsibilities

## Secretary Role (25 minutes)

### NOTE TO FACILITATOR

As you present the Secretary Role, think about your experience. If you have served as a secretary, identify examples you can share with participants.



1. SHOW the Secretary Role slide.

A presentation slide titled "Secretary Role". It features a portrait of a smiling man with his arms crossed, wearing a light green button-down shirt. The slide has a dark blue header bar with the title and a small cube icon. At the bottom, there is a "www.toastmasters.org" URL and the Toastmasters globe logo.

2. TELL secretaries they can find information about their role in the *Club Leadership Handbook* (Item 1310).

### NOTE TO FACILITATOR

When asking a question to the group, give participants time to think. Wait at least 10 seconds for participants to reflect and respond.



3. ASK

- What is the essence of the secretary role?
- Maintaining and managing club records, files, and correspondence
- Ensuring the club is organized and up to date

**NOTE TO FACILITATOR**

Leading large group discussions is easier when participants raise hands and wait to be called on before speaking. This ensures that everyone is heard and interruptions are minimal.

**4. PRESENT**

- Through this session you will learn how to make this manageable.

**NOTE TO FACILITATOR**

Sometimes group discussion goes on for too long or gets off track. Try bringing the group's attention back to the topic by referring to the session agenda and inviting members to continue their conversations after the session.

For example: "I'm glad we all have so many success stories to share about our time with Toastmasters, and I encourage you to continue these conversations after the session. For now, let's get back to discussing your responsibilities on the executive committee."

**5. ASK**

- What are the responsibilities of the secretary?
  - Take notes
  - Maintain files
  - Report new officers
  - Base Camp Manager

**6. Write responses on a flip chart.****7. PRESENT**

- Your role as secretary as stated in the Club Constitution and Standard Bylaws of Toastmasters International is: "The club secretary is responsible for club records and correspondence. The club secretary has custody of the club's charter, constitution, and bylaws and all other records and documents of this club; keeps an accurate record of the meetings and activities of this club and of the club executive committee; maintains an accurate and complete roster of individual members of this club, including the address and status of each individual member; and transmits the same to the successor in office. The club secretary provides notices of meetings as required by this constitution, and immediately notifies World Headquarters of Toastmasters International of any change in the roster of individual members."



- The constitution provides a definition. Yet, there are many responsibilities that make up the day-to-day activities of a secretary.
- Everything you do as secretary should support the club mission.



## Activity: Secretary Role

### NOTE TO FACILITATOR

For this activity, you will review the club mission statement with the group and ask participants to get into teams of four. Each team will be asked to brainstorm how their role supports the club mission.



1. SHOW the Activity: Secretary Role slide.

A screenshot of a presentation slide titled "Secretary Role". The slide features a portrait of a smiling man in a light green button-down shirt. Below the portrait is the website address "www.toastmasters.org" and the Toastmasters international logo. The slide has a dark blue header bar with the title and a small Rubik's cube icon.



2. ASK

- What is the club mission?
- We provide a supportive and positive learning experience in which members are empowered to develop communication and leadership skills, resulting in greater self-confidence and personal growth.



3. INSTRUCT secretaries to arrange themselves in teams of four.
4. INSTRUCT teams to spend 15 minutes brainstorming how the secretary supports the achievement of the club mission.

**NOTE TO FACILITATOR**

Walk around during the team discussions. This will allow you to answer any questions that come up and give you an idea of the responses the teams will share.

5. TIME 15 minutes.
6. INSTRUCT each team to share their findings with the group.
7. INSTRUCT secretaries to return to their seats.



15 minutes

**Debrief: Secretary Role****1. PRESENT**

- As secretary, you take notes, maintain files and report new officers.
- Everything you do as secretary supports the club mission.
- Let's take a closer look at your responsibilities and the tools you can use to fulfill your role.

## Secretary Responsibilities (30 minutes)



1. SHOW the Secretary Responsibilities slide.



The slide has a dark blue header bar with the title "Secretary Responsibilities". Below the header is a grid of three images showing people in various settings: a club meeting, people outside a club meeting, and members of the executive committee. Underneath each image is a dark blue box containing text: "The Club Meeting", "Outside the Club Meeting", and "The Executive Committee". At the bottom left is the website address "www.toastmasters.org" and at the bottom right is the Toastmasters globe logo.

2. PRESENT

- Your secretary responsibilities are in three categories:
  - The Club Meeting
  - Outside the Club Meeting
  - The Executive Committee
- We'll start by exploring your club meeting responsibilities.

## The Club Meeting

1. SHOW the Club Meeting slide.

**The Club Meeting**

- ▶ Before Club Meetings
- ▶ Upon Arrival at Club Meetings
- ▶ During Club Meetings



[www.toastmasters.org](http://www.toastmasters.org)



2. PRESENT

- Your club meeting responsibilities are split into three types:
  - Before Club Meetings
  - Upon Arrival at Club Meetings
  - During Club Meetings

3. SHOW the Before Club Meetings slide.

**Before Club Meetings**

- ▶ Post the previous minutes.
- ▶ Prepare a list of actions for the president.
- ▶ Update the club's officer list.



[www.toastmasters.org](http://www.toastmasters.org)



**4. PRESENT**

- Before Club Meetings:
  - Post the minutes of the previous club meeting online, and notify club members that the minutes are available for review.
  - Prepare for the president a list of actions to be taken during the business meeting, including unfinished business, announcements, and correspondence.
  - Update the club's officer list online when necessary.

**5. SHOW the Upon Arrival at Club Meetings slide.****Upon Arrival at Club Meetings**

- ▶ Circulate attendance sheet and guest book.

**6. PRESENT**

- Upon Arrival at Club Meetings:
  - Circulate the club's attendance sheet and Guest Book (Item 84) for members and guests to sign.

7. SHOW the During the Meeting slide.



### During Club Meetings

- ▶ Read previous minutes, note amendments, record current meeting minutes.



[www.toastmasters.org](http://www.toastmasters.org)



8. PRESENT

- During Club Meetings:
  - Read the minutes of the previous meeting, note any amendments, and record the minutes of the current meeting.

### Outside the Club Meeting



1. SHOW the Outside the Club Meeting slide.

### Outside the Club Meeting

- ▶ Maintain accurate roster.
- ▶ Submit club officer list.
- ▶ Handle correspondence.
- ▶ Keep club files.
- ▶ Attend club executive committee meetings.



[www.toastmasters.org](http://www.toastmasters.org)



2. PRESENT

- Outside the Club Meeting:

- Maintain an accurate membership roster and give it to the treasurer to submit with dues.
- Submit club officer list to World Headquarters within 10 days after elections.
- Handle general club correspondence.
- Keep club files, including the club charter, constitution and bylaws, minutes, resolutions, and correspondence.
- Attend club executive committee meetings.



3. SHOW the Outside the Club Meeting slide.

### Outside the Club Meeting

- ▶ Vote at international business meetings.
- ▶ Facilitate member progress in Base Camp.
- ▶ Arrange for your replacement or assistance.
- ▶ Prepare your successor for office.



4. PRESENT

- Outside the Club Meeting, continued:
  - Vote at international business meetings.
  - Facilitate member progress by verifying education, approving requests, and tracking progress on Base Camp.
  - Arrange for a replacement if unable to attend meetings.
  - Prepare your successor for office.

## The Executive Committee

- SHOW the Executive Committee slide.

**The Executive Committee**

- ▶ Read the previous meeting minutes.
- ▶ Note amendments.
- ▶ Record current meeting minutes.



[www.toastmasters.org](http://www.toastmasters.org)




### 2. PRESENT

- Now that we've looked at your club meeting responsibilities, we'll look at your executive committee responsibilities.
  - Read minutes of the previous meeting, note amendments and record current meeting minutes

### 3. PRESENT

- Now that we've looked at your responsibilities in and out of the club, as well as your executive committee, we can explore the specifics.

## Activity: How to Fulfill Secretary Responsibilities



### NOTE TO FACILITATOR

This activity begins with a group discussion about the most important responsibilities of the secretary. Write the responses on a flip chart.

Then, ask participants to get into teams of four and assign each team a responsibility from the flip chart. Each team will create an action plan to fulfill their assigned responsibility. If there aren't enough responsibilities, assign two groups to each responsibility.



1. SHOW How to Fulfill Secretary Responsibilities slide.

### How to Fulfill the Secretary Responsibilities



- ▶ How
- ▶ When
- ▶ Who
- ▶ What

[www.toastmasters.org](http://www.toastmasters.org)



2. ASK

- What are the most important responsibilities you have as secretary?



3. WRITE responses on the flipchart.



4. INSTRUCT secretaries to arrange themselves in teams of four and assign each team a secretary responsibility from the flipchart.



5. SHOW the Secretary Responsibility Action Plan slide.

### Secretary Responsibility Action Plan

- ▶ How will you fulfill this responsibility?
- ▶ When will each action be completed?
- ▶ Who is available to help you?
- ▶ What materials and resources can you use?

[www.toastmasters.org](http://www.toastmasters.org)



6. INSTRUCT teams to spend 15 minutes answering the following questions for their category.

- How will you fulfill this responsibility? (What specific actions will you complete?)
- When will each action need to be completed?
- Who is available to help you?
- What materials and resources can you use?

7. TIME 15 minutes.



15 minutes

8. INSTRUCT each team to share their findings with the group.

9. INSTRUCT secretaries to return to their seats.



## Debrief: Secretary Responsibilities

1. PRESENT

- You have responsibilities related to the club meeting and club executive committee.
- All of your responsibilities help to achieve club goals.
- Next, we'll look at some resources to help you fulfill your role.

## Secretary Resources (10 minutes)



1. SHOW the Secretary Resources slide.

### Secretary Resources



[www.toastmasters.org](http://www.toastmasters.org)



## 2. PRESENT

- There are several resources available to help you in your role as secretary.
- First, there is a checklist to get started.



3. SHOW the Getting Started slide.

### Getting Started

- ▶ Attend district-sponsored club-officer training program.
- ▶ Read materials.
- ▶ Meet with outgoing executive committee.
- ▶ Meet with outgoing secretary.
- ▶ Meet with current executive committee.
- ▶ Confirm submission of the newly elected officers list.
- ▶ Review and order any needed materials.

[www.toastmasters.org](http://www.toastmasters.org)



#### 4. PRESENT

- Getting Started
  - Attend district-sponsored club-officer training program.
  - Read the *Club Leadership Handbook* (Item 1310) and *Distinguished Club Program and Club Success Plan* (Item 1111).
  - Meet with the outgoing executive committee to transfer any necessary information.
  - Meet with the outgoing secretary to transfer any necessary files or information.
  - Meet with the current executive committee and develop the Club Success Plan and budget.
  - Confirm the outgoing secretary submitted the list of newly elected officers to World Headquarters and the district director.
  - Review and order any needed materials from the Toastmasters Online Store.

#### 5. SHOW the Additional Resources slide.



#### Additional Resources

##### Secretary Resources

*Distinguished Club Program and Club Success Plan* (Item 1111)  
*Guest Book* (Item 84)

Club officer list  
Use of Toastmasters materials

[www.toastmasters.org/1111](http://www.toastmasters.org/1111)

[www.toastmasters.org/84](http://www.toastmasters.org/84)

[www.toastmasters.org/clubcentral](http://www.toastmasters.org/clubcentral)

[www.toastmasters.org/memberlists](http://www.toastmasters.org/memberlists)

#### 6. PRESENT

- Additional resources can be found in the *Club Leadership Handbook* (Item 1310) in the Secretary section.



## Debrief: Secretary Resources

### 1. PRESENT

- There are many resources available to the secretary through the Toastmasters website and manuals.

# Conclusion

1. SHOW the Conclusion slide.



**This concludes the session.**

Club Officer Training



2. PRESENT

- In this session, you learned about the role and responsibilities of secretaries. Responsibilities include:
  - Taking minutes and attendance at meetings.
  - Handling club correspondence.
  - Maintaining club files and records.
  - Assisting with membership dues collection and submission to World Headquarters.
- Serving as secretary provides you with an opportunity to learn and practice specific communication and leadership skills, including accurate record keeping, time management and organization.

3. INSTRUCT secretaries to take the session evaluation.



# Evaluation

BEGINNER      INTERMEDIATE      ADVANCED

What level of knowledge of the topic did  
you have prior to this session?

**Indicate to what degree you agree with the following statements about this session.**

	STRONGLY AGREE	AGREE	NEITHER AGREE NOR DISAGREE	DISAGREE	STRONGLY DISAGREE
--	-------------------	-------	-------------------------------------	----------	----------------------

Overall, I was satisfied with the session.

I will use the content to strengthen my  
club.

The learning objectives were met.

Yes      No

Will you implement at least one idea from this session in the next 30 days?

Write your comments about the session.

(Large empty box for comments)

**Indicate to what degree you agree that the facilitator demonstrated the following:**

	STRONGLY AGREE	AGREE	NEITHER AGREE NOR DISAGREE	DISAGREE	STRONGLY DISAGREE
--	-------------------	-------	-------------------------------------	----------	----------------------

Solid knowledge of the subject matter

Excellent presentation skills

