



TOASTMASTERS
INTERNATIONAL

ACHIEVING SUCCESS AS **SECRETARY**

Club Leadership
Training Session



**WHERE LEADERS
ARE MADE**

Club Leadership Training Session



THE MISSION OF THE CLUB

The mission of a Toastmasters club is to provide a mutually supportive and positive learning environment in which every individual member has the opportunity to develop oral communication and leadership skills, which in turn foster self-confidence and personal growth.

ACHIEVING SUCCESS AS **SECRETARY**

TOASTMASTERS INTERNATIONAL

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**WHERE LEADERS
ARE MADE**

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CLUB LEADERSHIP TRAINING SESSION

The club is the heart of the Toastmasters program. It provides the environment and support members need to develop their communication and leadership skills. Club officers support the club and sustain consistent club quality to keep members satisfied. In order for a club to be successful, club officers must know their roles and responsibilities. That's why this training session is so important: it identifies performance standards and describes how to achieve them.

The cornerstone of a good training session is preparation. A good presenter of a club officer training session is familiar with the Club Officer Handbook (Item 1310). This item is available online at www.toastmasters.org/clubofficerroles.

Training does not end with the training session. It is a process that continues throughout an officer's term. Let your trainees know the area governor and district leaders are all available to help if questions arise during their term of office, and provide them with area and division governor contact information for their respective clubs.

CONDUCTING THE SESSION

Club secretaries are responsible for keeping clear and accurate records of club business. This training will identify a secretary's responsibilities and discuss some ways to fulfill them.

This product consists of three parts:

1. Definition and explanation of the session
2. A training outline
3. A PowerPoint presentation to be viewed along with the session

IN YOUR OWN WORDS

The outline is not a script and should not be read word-for-word. Instead, use the document as a guide for presenting the material with your own narrative style. This training session may be modified by each district as necessary.

USING VISUAL AIDS AND HANDOUTS EFFECTIVELY

Visual aids and handouts add interest and help your audience retain information. You are encouraged to use them. If you plan to use the PowerPoint slides for this session as visual aids, you will need a data projector, a laptop computer, a table to support them, and a screen for viewing. In the outline, in the right-hand column, are indications for placement of the PowerPoint slides and distribution of handouts. Each is numbered. Please note that the first slide in the PowerPoint show is a title slide and is not included in this numbering system.

If you cannot arrange for projection equipment but still would like to use visuals, you may copy the material onto a flipchart. Do this before the presentation. Use a heavy marking pen that does not seep through the paper, and write on every third or fourth page so succeeding visuals will not show through. Also, make your letters large and heavy with plenty of space between them.

Follow these tips when using visual aids:

- ▶ Set them up and test them before the meeting begins. Place them so they are easily visible to listeners. Place your projector so it projects a large, high, undistorted image on the screen. Focus the image.
- ▶ Bring spare equipment, such as a projector bulb, extension cord, and extra marking pens.
- ▶ Display your visuals only when they are needed. If you are using a flipchart, flip the page back out of view when you are finished with it.
- ▶ Remember not to stand between the screen or flipchart and your audience or you will block their view.
- ▶ Maintain eye contact with your listeners. Do not talk to the screen or flipchart. If you must turn your back to point out something, pause as you point it out, and then resume speaking only when facing your audience again.

HOW TO USE THE OUTLINE

As you prepare for the session, keep two things in mind:

1. Fit your planned discussion into the time allocated.
2. Allow ample time for group discussion and participation.

Mention that trainees can find information on all of the duties of office in their club officer manual. Urge them to use the Web Resources page in the Appendix of their officer manual.

CHECKLIST FOR TRAINING

- ____ Visual aids prepared
- ____ Room arranged and properly equipped
- ____ Supplies and reference materials on hand
- ____ Laptop and projector available
- ____ Flipchart, easel, and marking pens available
- ____ Notepads and pencils available for each participant

EVALUATION AND FOLLOW-UP

Ask the participants to fill out the evaluation form at the end of the session. Use this information in planning future sessions.

Evaluate the use of materials. Be sure to follow up with the club officers throughout their term. Keep in mind that learning is a continuous process. Hold formal or informal review sessions as frequently as possible. If necessary, hold a make-up session for those who were unable to attend.

OUTLINE

V1

STANDARDS FOR SUCCESS

Club officers are responsible for fostering an environment of meaningful self-development within the club for all members. Officers accomplish this in part by meeting specific performance standards that:

- ▶ Help officers clearly understand their roles.
- ▶ Provide a point of reference for club members to better understand what to expect from club officers.
- ▶ Aid members when evaluating current leaders and candidates for office.
- ▶ Facilitate communication when expectations differ among club officers and members.

V2

Outside the Club Meeting:

The following standards identify the performance that the secretary must demonstrate outside of the regular club meeting environment to ensure he or she understands his or her roles and to help club members know what they should expect from the secretary.

- ▶ Maintain an accurate membership roster and give it to the treasurer to submit with dues.
- ▶ Mail 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.
- ▶ Attend district-sponsored club officer training.
- ▶ Arrange for a replacement if unable to attend meetings.
- ▶ Prepare your successor for office.

V3

V4

At the Club Meeting:

The following standards identify the performance that the secretary must demonstrate during club meetings.

- ▶ Record and read meeting minutes.
- ▶ Greet members and guests.

Trainer: Ask trainees if they have questions about their duties that are not addressed in their officer manual. If so, address the questions. If not, continue the training.

V5

YOUR LEADERSHIP OPPORTUNITY

Serving as secretary is an opportunity to develop and enhance leadership skills while serving the club. To enjoy a successful and rewarding term a secretary must:

- ▶ Set realistic and attainable goals.
- ▶ Plan how to accomplish the goals.
- ▶ Delegate tasks as needed.
- ▶ Monitor progress toward goals.
- ▶ Coach team members when necessary.

Exercise

Trainer: Divide trainees into small groups. Have each group develop three goals for a club and create a plan to accomplish the goals. Discuss the goals and strategies developed by the small groups with the entire group.

For example, one goal the secretary has, is to review the Toastmasters Product Guide or online store (www.toastmasters.org/shop) and order materials. The plan may include speaking with the sergeant at arms to determine materials needed for the club.

The skills of motivation, delegation, and coaching also are instrumental to the success of leaders.

V6

Motivation

Motivating fellow club members to put forth the efforts necessary to attain a goal can be challenging. Leaders must have a deeper understanding of the concept of motivation in order to use it effectively. There are five principles to help leaders successfully motivate club and other team members.

Five Steps of Motivation

1. **Understand what motivates each person by learning about their:**
 - ▶ Personal aspirations
 - ▶ Professional objectives
 - ▶ Toastmasters goals
2. **Focus on the benefit to the individual.**
 - ▶ Show the team member how participation will be of personal value.
3. **Make expectations clear.**
 - ▶ Set milestones for achieving goals and share it with team members.
4. **Recognize their work.**
 - ▶ Point out team members' Toastmasters participation.
 - ▶ Say "thank you" when the team member accomplishes a task.
5. **Be a leader.**
 - ▶ Recognize an individual's success.
 - ▶ Be enthusiastic about the work to be done.
 - ▶ Support team members in all tasks.

Trainer: Ask the group to suggest specific examples for each step of motivation then briefly discuss the suggestions.

For example, you may not be able to attend the Executive Committee meeting. You ask someone to attend in your place and take the minutes. As a leader, that's the perfect opportunity to recognize them for their willingness and participation.

V7

Delegation

Club officers must carefully delegate authority to team members in order to accomplish the team's goals and objectives. Delegation is the process of transferring a responsibility from one person to another and empowering that individual to accomplish a specific goal. By following the five steps of delegation, a leader not only creates opportunities for other team members to gain leadership experience, but also builds a stronger team that can accomplish more.

Five Steps of Delegation:

1. **Decide what to delegate.**
 - ▶ Prioritize your tasks.
 - ▶ Identify what can be delegated.
2. **Decide who will do the task.**
 - ▶ Select a team member who is available and capable of completing the task.
3. **Assign responsibility.**
 - ▶ Allow the person to decide if they can handle the task.
 - ▶ Clearly explain what needs to be done.
4. **Grant authority.**
 - ▶ Provide the necessary tools and resources.
 - ▶ Confer the authority needed to make required decisions.
5. **Establish accountability.**
 - ▶ Define reporting requirements.
 - ▶ Set a timeline with milestones.

V8

Barriers to Delegation:

Sometimes leaders are reluctant to delegate tasks. Leaders must learn to recognize five of the common barriers to delegation and work to overcome them.

- ▶ Lack of confidence in others' ability to do the job
- ▶ Fear of losing control of the team or project
- ▶ Selfishness – not wanting to share credit
- ▶ Insecurity – feeling bad about asking others to do things for you
- ▶ Reluctance – fear that another person will do so well that he or she will usurp leadership

Trainer: Solicit trainees for methods for overcoming barriers. Discuss with the group. Conduct a discussion about delegation and how to use it within the scope of this office.

V9

Coaching

The secretary is a member of the executive committee. This means he or she is mutually responsible for ensuring each officer meets performance standards. Occasionally, a team member will demonstrate a need for guidance. The secretary can help by coaching the team member and providing opportunities to improve and build new skills. This attentive coaching will help the team member to meet standards. Leaders can help their team members to improve by following these:

Four Steps to Successful Coaching:

1. **Agree that a problem exists.** The leader and the team member can't solve a problem until both agree there is a problem.
2. **Discuss solutions.** The leader and the team member should outline possible solutions to the problem.
3. **Agree on an action.** The leader explains the behavior necessary to produce the desired result, and develops a timetable for carrying it out.
4. **Follow up.** It isn't enough to simply point someone in the proper direction. Leaders must stay in contact to ensure the team member remains on course.

V10

GROUP ACTIVITY: COACHING A TEAM MEMBER

The secretary and treasurer are working to complete the dues renewal process for the club. The secretary has not yet updated the club's roster with the names of new members and the submission of renewals to World Headquarters will be late.

Trainer: Ask the trainees to point out the consequences of this inaction. Write the answers on a flipchart.

Possible answers:

- ▶ Members will be ineligible to vote at club meetings.
- ▶ Members will be ineligible to run for or hold a club office.
- ▶ Members may be ineligible to participate in speech contests.
- ▶ Members will be ineligible to receive educational awards.
- ▶ Members will not receive the Toastmaster magazine.
- ▶ The club will not receive DCP credit for submitting dues on time.

Exercise

Trainer: Divide trainees into groups of three. Each group member will play one of three parts – secretary, treasurer, or observer. Using the scenario above, the treasurer will provide feedback, the secretary will receive the feedback, and the third person will observe. The goal of this exercise is for the treasurer to successfully coach the secretary using the four steps to successful coaching.

1. Agree that a problem exists.
2. Discuss solutions.
3. Agree on an action.
4. Follow up.

The observer in the group will note the behaviors and words used by the other two participants and identify the strengths and weaknesses of the interaction.

If there is enough time, have group members shift roles and then practice the scenario again. All participants should take on a role different from the one in the preceding exercise.

Ask trainees to share their thoughts about their experience in the exercise – giving feedback, receiving feedback, or observing.

Trainer: Remind trainees to review the calendar and the Web resources in the Appendix of the officer manual.

RECORD MEETING MINUTES

Accurate meeting minutes keep track of the business conducted at a meeting, how decisions were made, and who was assigned to handle specific tasks.

V11

Tools for Taking Notes

The method for recording minutes varies depending on club tradition, the individual taking the minutes, and the tools available. Some common tools include:

- ▶ Laptop computer
- ▶ Voice recorder
- ▶ Whiteboard or flipchart
- ▶ Paper and pen

V12

Suggestions for Recording Minutes

When preparing his or her successor for office, it is helpful if the outgoing and incoming officers take minutes in tandem during a meeting. Afterward the outgoing officer can point out any missed information and offer appropriate guidance. Some other practical suggestions are to:

- ▶ Use the meeting agenda and the Record of Regular Meeting form in the back of the secretary's manual to create a template for standard club meetings.
- ▶ Adapt the form or create another template for executive committee and other special meetings.
- ▶ Create a diagram of where each person is seated during the meeting to keep accurate account of each individual's statements.
- ▶ Record key themes of discussions. Don't try to write word-for-word transcripts.
- ▶ Use bullet points to make the minutes easier to read.
- ▶ Ensure that your notes will be clear to everyone, including future readers.
- ▶ Double check your facts, proofread, and spell check the minutes before logging the minutes in the club's records.

V13

Transcribing Minutes

The rhythm or pace of a meeting can vary and secretaries often use shorthand to record minutes so it is important to transcribe them into a readable format. When transcribing minutes, remember to:

- ▶ Transcribe minutes as soon as possible after the meeting, when your memory is still fresh.
- ▶ Use a consistent format and standard verbiage. For example, resolutions may be introduced with the words "Resolved that. . ." Use whatever format is standard for your club.
- ▶ If there are long reports or supplementary material, add these to the minutes as an appendix.
- ▶ Record the date and sign your name and indicate you were the minute-taker.
- ▶ File minutes chronologically.

Trainer: Ask trainees if there are any questions about recording meeting minutes. Discuss which tools and transcription methods that trainees believe will be most beneficial and why.

V14

DISCUSSION EXERCISES

Trainer: Use the following scenario to begin a discussion with trainees about the duties of the office and the repercussions for other club members when the secretary does not fulfill his or her duties.

1 Submitting Forms and Reports

A month ago two new members joined a Toastmasters club. Both are having a difficult time becoming involved in the club because they haven't received their *New Member Kits*. The club secretary is receiving complaints from a number of other established members. Several have been turned away from participating in Toastmasters speech contests; others have been denied educational awards, despite the fact they completed the requirements and submitted the necessary paperwork.

What duties and responsibilities should the secretary fulfill to solve these problems?

Recommended Solutions:

- ▶ Promptly report all new members to World Headquarters so they can receive their *New Member Kits*; World Headquarters ships *New Member Kits* within 48 hours of receiving an Application for Membership. Consider having a few extra CC and CL manuals on hand to give new members immediately in exchange for those they will receive from World Headquarters.
- ▶ Completely fill out your dues renewal so members will be eligible for speech contests and educational awards and receive the *Toastmaster* magazine.
- ▶ Submitting new members and dues renewals online will ensure the information is processed immediately. Also, your club will receive confirmation that the information has been received and the transaction is being processed.
- ▶ Members who pay late can be paid anytime during the renewal period. Pay late submissions online for faster processing.

Exercise

Trainer: Divide trainees into groups of twos and threes and distribute the handout. Ask them to complete the following exercise as a team then review the solutions with the whole group.

2 When Dues Are Due

Your president has received the dues renewal reminder email from World Headquarters for the October-March dues period. Now you are meeting with the president, treasurer, and vice president membership to update the club's roster. Using the following information, complete the renewals, and determine the amount of dues (\$27 per member) to submit with the membership roster.

- ▶ Two people, Elizabeth Buchwald and Arturo Gonzalez, joined your club in September. Their names are not among those on the list. Your vice president membership has already mailed the Applications for Membership, new member fees, and dues for September to World Headquarters.
- ▶ Two people, James Davidson and Cam Lu, have told your vice president membership they no longer will be participating in the club.
- ▶ One person, Elena Petrovski, has not yet paid dues to the treasurer.
- ▶ One person, James Bond, has a new address: 123 Pontificate Place, Oakdale, CA.
- ▶ The club should submit \$486 dues for 18 members. James Davidson, Cam Lu, and Elena Petrovski have not paid dues. Elizabeth Buchwald and Arturo Gonzalez's names and addresses should be added and their dues should be included. James Bond's address change can be sent by email to addresschanges@toastmasters.org. The address change should be marked out and his new one written in, if submitting by mail.

CLOSING

Serving as secretary is not only a responsibility, it is a privilege. It is an opportunity to learn and practice communication, organization, and leadership skills as well as to support fellow members, educate new leaders, and contribute to the success of the club as a whole.

ADDITIONAL RESOURCES

General Leadership

Laws for Positive Leadership

The article "Laws for Positive Leadership" (*Toastmaster* magazine, September 2006) by Victor Parachin describes how to be a leader others want to follow.

The Leadership Excellence Series Set (Item 310)

A complete set of *The Leadership Excellence Series* modules containing outlines and PowerPoint presentations. Individual module titles include: "Resolving Conflict," "Building a Team," "Motivating People," and "The Leader as a Coach."

"Leadership, Part I: Characteristics of Effective Leaders" (Item 255)

This educational seminar program explores the qualities, values, and styles effective leaders display.

"Leadership, Part II: Developing Your Leadership Skills" (Item 256)

"Leadership, Part III: Working in the Team Environment" (Item 258)

This educational program helps participants learn to use leadership skills as they pertain to working with and leading teams.

Delegation Techniques

Delegating Authority

The best way to wield power is to share it responsibly. In order to accomplish the team's goals and objectives, a leader must carefully delegate authority to team members.

High Performance Leadership (Item 262)

This five-project program offers instruction and practice in vital leadership skills.

The 360° Leader (Item B119)

In *The 360° Leader*, international best-selling author, speaker, and consultant John C. Maxwell shows how 99% of all leadership in most organizations takes place in the middle. And he shares the secrets of how to increase your influence - from wherever you are.

"Delegate to Empower" (Item 315)

This presentation discusses how to effectively delegate tasks and responsibilities.

"Building a Team" (Item 316)

Build teams through delegation. This presentation reviews how to create and lead a team.

Conflict Resolution

"Effective Solutions for Team Conflict"

Renee Evenson's article for the *Toastmaster* magazine explains that when you confidently manage conflict others will see you are a person of action and will respect your forthrightness and leadership.

"Turning Team Conflict into Team Harmony"

In his article for the *Toastmaster* magazine, "Turning Team Conflict Into Team Harmony," Dave Zielinski cites team-building experts who offer advice on how to be a team leader, leading volunteer-based teams, and what to do when your team isn't working.

Online Submissions / Club Business

Pay Membership Dues

Click the box to the left of the name of each member for whom you are paying dues. All individuals for whom dues may be currently submitted appear on this list.
New members appear at the end of the list.

All membership dues submitted online must be paid using Visa, MasterCard, AmEx or Discover.

Dues are non-transferable and non-refundable, so only pay for those members who have already paid dues to your club (if any).

☐ Show All ☐ Renewals only ☐ New members only

CHECK IF RENEWING						
☐ check/uncheck all	MEMBER NUMBER	MEMBER NAME AND ADDRESS	BEGIN DATE	END DATE	Amount Due	ORDER NUMBER
☐	00000000	Zaphod Beeblebrox, ACB, CL 42 Prefect Place Magrathea, CA 44445	Jun 2000	Sept 2011	27.00	00000000
☐	00000000	James Bond, CL 1878 Smedley Dr Nowhere, CA 88888	Apr 2010	Sept 2011	27.00	00000000
☐	00000000	James Davidson 5555 Elm St There, CA 54321	Feb 1998	Sept 2011	27.00	00000000
☐	00000000	Jane Eyre, CTM, CL 1848 Smithelder Pkwy Bronte, CA 32132	Apr 2010	Sept 2011	27.00	00000000
☐	00000000	Huck Finn, CC 1876 Twain St Mississippi, CA 01883	Apr 2010	Sept 2011	27.00	00000000
☐	00000000	Hermione Granger 8668 Potter Place Hogwarts, CA 34567	Jun 2000	Sept 2011	27.00	00000000
☐	00000000	Roxie Hart 1924 Jazz Lane Chicago, CA 88888	Apr 2008	Sept 2011	27.00	00000000
☐	00000000	Sherlock Holmes 221B Baker St London, CA 18811	Feb 1998	Sept 2011	27.00	00000000
☐	00000000	Anna Karenina 1832 Tolstoy Dr Pushkin, CA 03033	Oct 2006	Sept 2011	27.00	00000000

☐	00000000	Clark Kent 9876 1 st St Smallville CA 55555	Oct 2005	Sept 2011	27.00	00000000
☐	00000000	Mary Lisbon 1993 Eugenides Way Grosse Point, CA 65432	Oct 2006	Sept 2011	27.00	00000000
☐	00000000	Cam Lu, DTM PO Box 777 Here, CA 99999	Apr 2010	Sept 2011	27.00	00000000
☐	00000000	Dean Moriarty 5543 Kerouac Rd America CA 45454	Oct 2006	Sept 2011	27.00	00000000
☐	00000000	Mickey Mouse 1234 MainSt Disneyland, CA 44444	Jun 2000	Sept 2011	27.00	00000000
☐	00000000	Agnes Nutter 66666 Prachett Dr Gaiman, CA 78978	Feb 1998	Sept 2011	27.00	00000000
☐	00000000	Peter Parker 1960 Spider Cir New York, CA 12312	Oct 2006	Sept 2011	27.00	00000000
☐	00000000	Elena Petrovski 1968 Street Ave Elsewhere, CA 33333	Oct 1973	Sept 2011	27.00	00000000
☐	00000000	Barney Rubble 1950 Cave Dr Stone Age, CA 00001	Jun 2000	Sept 2011	27.00	00000000
☐	00000000	Grover Smith 1234 Sesame St Anywhere, CA 12345	Feb 1996	Sept 2011	27.00	00000000

Click the Proceed to Confirmation button once you have completed your selections

Proceed to Confirmation

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EVALUATION FORM

Date: _____ Session Name: _____

Facilitator: _____

On a scale of one to five, five being the highest rating, please rate the course and facilitator on the following items by circling the number you find most appropriate:

1.	How relevant was this session to your job in Toastmasters?	1 2 3 4 5
2.	Rate the following:	
	Course	1 2 3 4 5
	Facilitator	1 2 3 4 5
	Activities/Exercises	1 2 3 4 5
3.	Were the objectives clearly stated?	1 2 3 4 5
4.	How was the lesson plan organized?	1 2 3 4 5
5.	Did the instructional methods clearly illustrate the instructor's plan?	1 2 3 4 5
6.	To what extent did the visual aids add to your understanding of the presentation?	1 2 3 4 5
7.	How were the meeting facilities?	1 2 3 4 5

8. What are two things you learned that will make you a more effective club officer?

Additional Comments: