



TOASTMASTERS
INTERNATIONAL

ACHIEVING SUCCESS AS **TREASURER**

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 TREASURER



**WHERE LEADERS
ARE MADE**

**TOASTMASTERS
INTERNATIONAL**

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TABLE OF CONTENTS

Club Leadership Training Session	4
Conducting the Session	4
In Your Own Words	4
Using Visual Aids Effectively	4
How to Use the Outline	5
Checklist for Training	5
Evaluation and Follow-up	5
Outline	6
Standards for Success	6
Your Leadership Opportunity	7
Group Coaching Activity	9
Prepare a Budget	10
Fundraising	11
Discussion Exercises	12
Closing	13
Additional Resources	14
Evaluation	17

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 treasurers are responsible for keeping clear and accurate financial records of club business and for seeing that the club remains financially stable. This training will identify a treasurer'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 leaders 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 treasurer 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 treasurer.

- ▶ Prepare a budget to be approved by the executive committee and membership within one month of taking office.
- ▶ Provide the bank with a new signature card by July 1/ January 1.
- ▶ Prepare and send dues statements by August 15/February 15.
- ▶ Collect and pay dues to World Headquarters by October 1 and April 1, and work with the vice president membership to contact members who have not paid dues. Pay dues online at www.toastmasters.org

V3

- ▶ Submit new member applications and dues to World Headquarters within 48 hours after receipt or add new members online.
- ▶ Pay bills as due.
- ▶ Keep records of all financial transactions.
- ▶ Present verbal and written financial reports to the executive committee quarterly (October 15, January 15, April 15 and July 15).
- ▶ Submit club accounts for audit.
- ▶ Attend club executive committee meetings.
- ▶ Attend district-sponsored club officer training.
- ▶ Arrange for a replacement if unable to attend a meeting.
- ▶ Prepare your successor for office.

V4

At the Club Meeting:

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

- ▶ Receive completed new member applications and dues.
- ▶ Announce when dues are due and explain dues structure.
- ▶ Allow time before and after the meeting to speak with 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 club treasurer is an opportunity to develop and practice budgeting and money management skills and enhance leadership skills while serving the club. To enjoy a successful and rewarding term, a club treasurer 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 relating to the duties of club treasurers and a plan to accomplish the goals. Discuss the goals and strategies developed by the small groups with the entire group.

For example, one goal a treasurer has is to submit new member dues. To ensure timely submission, you may develop a plan that includes an email to the new member, making a reminder phone call, and personal reminders to make sure the application and money are sent immediately.

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 will be out-of-town for a month due to business and vacation. You ask a member to conduct your duties. This is a perfect time to make expectations clear.

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 club treasurer is a member of the executive committee. This means he or she, as well as the other officers on the committee, is responsible for ensuring each officer meets the standards for his or her office. Occasionally, a team member will demonstrate a need for guidance and the treasurer must coach the team member and provide opportunities to improve existing skills and build new skills so the team member can 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.

V11

PREPARE A BUDGET

Treasurers work with the president and executive committee to develop a budget for the upcoming club year. The club's budget is the basis for financial stability that permits clubs to achieve their mission.

Gather Materials

- ▶ **A list of expenses.** Determine how much money the club spends, and what it is spent on. Common club expenses include:
 - Trophies and ribbons
 - Administrative supplies
 - Educational material (e.g. manuals, The Leadership Excellence Series presentations)
- ▶ **A list of income sources.** Determine how much money the club receives. Common club income includes
 - Member dues
 - Donations
 - Fundraising activities
- ▶ **Previous years' financial records.** Refer to records from previous years for guidance.
- ▶ **A calculator**

V12

Create the Budget

- ▶ Set a goal. What does the club wish to accomplish? Defining a goal helps the club measure its progress toward meeting that goal.
- ▶ Create categories for expenses. For example: evaluation forms, ballots, nametags, ribbons, and trophies. Organize expenses so funds are allocated to the most important items first.
- ▶ Use a consistent record-keeping method. Some people prefer using a ledger while others prefer to use computer software. Use the method that best suits your club's needs.
- ▶ Submit the completed budget for the year to the executive committee for approval.

Remember that:

- ▶ Treasurers must prepare and submit a verbal monthly financial report to the club with a written copy to the executive committee.
- ▶ The funds spent cannot be more than the funds that come in.
- ▶ Funds cannot be used on items not budgeted for or those that do not support the club mission.

Trainer: Ask trainees about their club budget objectives and what type of income sources they plan to employ.

V13

FUNDRAISING

Clubs may occasionally conduct fundraising activities to offset costs for educational sessions and to raise funds to further the purpose of Toastmasters International. All club funds, whether they are derived from dues or fundraising, must be used for tax exempt purposes only.

Some Tax Exempt Purposes

- ▶ Building and improving clubs
- ▶ Training club and district officers
- ▶ Purchasing educational program materials
- ▶ Sending a voting delegate to official district conferences or the International Convention
- ▶ Covering general administrative expenses connected with the operation of the club or district

V14

Is Your Fundraiser Suitable?

Ask the following questions before beginning a fundraising project. Any "no" answers to the questions means the fundraising activity is not permitted.

- ▶ Did individual members donate the products or volunteer the service?
- ▶ Is it the club, rather than individual members, that is receiving monetary compensation?
- ▶ Is at least one-third of the club's total financial support from member dues?
- ▶ Will the profits be used for the furtherance of Toastmasters International's tax exempt purpose?

V15

Some Fundraising Suggestions

If you wish to hold a fund-raiser, consider the following activities:

- ▶ Conduct a Speechcraft or a presentation from the *Success/Communication Series* or *Success/Leadership Series* and charge a reasonable fee to participants. Revenues would be used to purchase the program material, with any excess funds to be returned to the club.
- ▶ Hold a raffle, auction, white elephant sale or bazaar of donated goods, with the revenues going to further the educational objectives of Toastmasters International.
- ▶ Accept advertising in the club newsletter, with the revenue being used to offset newsletter production or mailing costs.
- ▶ Sell entertainment books or diner's books.
- ▶ Create and maintain a speakers bureau, with the revenues going toward items or activities that further Toastmasters International's tax exempt purpose as an educational organization.

Note: Some fund-raising activities such as picnics, sporting events, and fireworks displays have a high risk of injury and are not permitted.

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

V16

DISCUSSION EXERCISES

Trainer: Ask trainees to analyze the following situation and formulate solutions. Divide trainees into groups of two or three and complete the exercise as a team. Review the teams' answers as a large group.

1 Delinquent Payments

The treasurer sent dues statements to all club members and all members have paid except one. The treasurer reminds the delinquent member to pay dues at each meeting, but the member still doesn't produce payment. How should the treasurer handle the situation?

Possible answers:

- ▶ After giving members repeated reminders, state that when payments are delinquent, the treasurer's duty is to notify World Headquarters. In turn, World Headquarters will remove their names from the club's membership roster, and the members will no longer have any rights within the club, receive the magazine or any other materials, and will be ineligible for contests.
- ▶ If a member has not paid and still shows up at meetings, the club can vote that person out and disallow further participation in club activities. CAUTION: This can be a very sensitive issue, so it's imperative the club president consult *When You Are the President* for the correct procedure.

Exercise

Trainer: Keep 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, secretary, 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 club officer 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: