



DISTRICT 2-E2 TRAINING



LIONS CLUB
SECRETARY TRAINING 2025 - 2026
PRESENTED BY: 2-E2 GLT DEB CASHEN

PREPARE TO LEAD; PREPARE TO SUCCEED



You can log into the Lions Learning Center to access online club officer courses which review key aspects of your role and responsibilities - “Club Secretary Responsibilities.” You can also obtain the same information with key links to the Lions Learning Center for specific topics via the Secretary E-Book found on the LCI website and www.lions2e2.org website under “Resources”.

This training is designed to show you how and where to get information that will help you in your position as club secretary.

Lion Portal Search [] [Search] [Bell] [User]

Home Membership Service Learn Reports/Insights Shop More

Welcome Deborah Cashen!

MY MEMBERSHIP MY CLUB MY CA MY ASSOCIATION

Dashboard Lion Member... Refresh [v]
The Portal Home Page for Launch
As of Jun 14, 2024, 2:19 PM-Viewing as -

Lions Membership Today
Number of Active Lions

Welcome to the Lion Portal

We have taken the functionality of MyLion, MyLCI, Insights and other tools and combined them into one cohesive and consistent experience – the Lion Portal.

These resources and FAQs will help make sure that you and your fellow Lions and Leos keep current on Lion Portal news.

Frequently Asked Questions Training Videos Helpful Resources

Announcements:

DONATE

QUICK LINKS

- Lions Clubs International Convention
- Global Action Team
- Melvin Jones Fellowship
- Lions Quest

Contact Members Services
Email: lionsupport@lionsclubs.org
Phone: (+001) 630-468-6900

SERVICE TO YOUR COMMUNITY



2025-2026 A. P. Singh Presidential Theme

Lead to Serve, Serve to Lead









“When Lions serve with passion and purpose, when we place the needs of others before our own, we are servant leaders who strengthen our communities, our organization and the lives of the people we serve.”

Become familiar with your club’s Service Plans and Goals

As Secretary, your role is the Communicator between the Board of Directors, Club Members, and Zone Chair. Your contributions help lead your Club in accomplishing established Service Plans & Goals?

LIONS DISTRICT 2-E2 SECRETARY TRAINING - LCI E-BOOK

LIONS DISTRICT 2-E2 PRES/VP TRAINING - LCI E-BOOK

 <p>Learn more</p> <h3>Childhood cancer</h3> <p>We provide support for the needs of children and families affected by childhood cancer.</p>	 <p>Learn more</p> <h3>Diabetes</h3> <p>We work to reduce the prevalence of diabetes and improve quality of life for those living with diabetes.</p>	 <p>Learn more</p> <h3>Disaster relief</h3> <p>We take steps to meet immediate needs and provide long-term support for communities devastated by natural disasters.</p>	 <p>Learn more</p> <h3>Environment</h3> <p>We find ways to protect the environment to create healthier communities and a more sustainable world.</p>
 <p>Learn more</p> <h3>Humanitarian</h3> <p>We identify the world's most crucial needs and provide humanitarian aid where it's needed most.</p>	 <p>Learn more</p> <h3>Hunger</h3> <p>We strive to improve food security and access to nutritious food to help alleviate hunger.</p>	 <p>Learn more</p> <h3>Vision</h3> <p>We help prevent avoidable blindness and improve quality of life for people who are blind or visually impaired.</p>	 <p>Learn more</p> <h3>Youth</h3> <p>We support young people so they can make positive choices, lead healthy and productive lives, and become the next generation of service leaders.</p>

8/12/2025

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LET'S START WITH ACRONYMS



DG – District Governor

1st VDG – First Vice District Governor

2nd VDG – Second Vice District Governor

IPDG – Immediate Past District Governor

PDG – Past District Governor

GMT – Global Membership Team

GLT – Global Leadership Team

GST – Global Service Team

GMA – Global Membership Approach

PID – Past International Director

GET – Global Extension Team



CLUB SECRETARY RESPONSIBILITIES



Our Constitution
and Bylaws



BECOME FAMILIAR WITH YOUR CLUB CONSTITUTION & BYLAWS

CREATE YOUR LION PORTAL
ACCOUNT!

<https://lionsinternational.mysite.com>

Self explanatory on this website!

Your Lion account allows you access to:

Lion Portal – Create Club Profile, Manage Officers, Membership and Service Activities. Access to Club Reports.

Lion Portal – Report service hours, plan service projects, connect with other Lions.

Insights – Comprehensive overview of LCI in the areas of Membership, Service Activity, Donations and Club strength.

Learn – Central location to complete Lions Learning Center courses, search for LCI International institutes (ALLI, FDI, LCIP) view local trainings as reported by Multiple District and District GLT Coordinators and allows an individual Lion or Leo to access their “My Learning Record” report.

Lions Shop – An easy way to order common club supplies and merchandise. Presidents, Secretaries or Treasurers can use club funds to purchase items.

SECRETARY RESPONSIBILITIES



- Maintain the club roster and report membership to LCI
- Prepare all documents, agendas for meetings and record minutes of all business proceedings
- Keep files of all pertinent records
- Manage club correspondence
- Actively participate in Zone Meetings
- Turn over all records to incoming secretary at conclusion of term of service
- Prepare documents authorizing new signatories for club accounts at a board meeting after the completion of the club officer elections and prior to them taking office in the new fiscal year. The resolution should also contain the names of officers being removed as signatories at the end of the fiscal year. This resolution should be recorded in the club minutes and upon request may be made available to the club's banking institution.

ESTABLISH A CLUB CALENDAR



October 2024

Lions Membership Growth Month

OCT 01 **Deadline for purchase of Peace Poster Contest kits**
October 1, 2024
Last day Lions can purchase Peace Poster Contest kits from the Lions International Shop.

OCT 01 **LCIF grant application deadline**
October 1, 2024
LCIF grant application deadline for consideration in January 2025 by the LCIF Board of Trustees for Childhood Cancer, Diabetes, Hunger, Matching, and Lions Quest grant applications.

OCT 10 **World Sight Day**
October 10, 2024
Recognize World Sight Day by planning a vision service project with your club.
[Learn more](#)

OCT 18-20 **Faculty Development Institute (FDI) CA 3**
October 18, 2024 - October 20, 2024 - São Paulo, Brazil
[Learn more](#)

LCI CALENDAR

Note the Causes under the Month Designated

CLUB DISTRICT STATE & LCI CALENDARS

District information is found at

www.lions2e2.org

State information is found at

www.texaslions.org

LCI also has a calendar on their website:

www.lionsclub.org 8/12/2025

CLUB CALENDARS



- Assist the club president in preparing the club calendar for the fiscal year.
- Ensure that monthly club and board meeting dates are set. Review and update the club meeting location/time on the club's home page.
- Check with District leaders for key events and deadline dates (conventions and district-level awards).
- Prepare for Quarterly meetings of the District Governor Advisory Board (Zone Meetings).
- Make note of the club meeting or event that includes the District Governor annual club visit.
- Make note of visits by other District Leaders
- Be ready to assist with meeting logistics and making arrangements for club meeting space.
- Maintain a calendar of District and Multiple District Events



NEW MEMBER INDUCTION CEREMONIES



The Induction Ceremony is the symbolic beginning to a member's service as a Lion. It is also a key element in the lifelong retention of a member. A thoughtful induction, followed by a thorough orientation and meaningful involvement in the club's activities will keep a new member interested and engaged in the club.



- 1) Ensure the New Member Kit is current (ordered on LCI Shop – No Cost to Club)
- 2) Prepare the certificates in the kit. (Two certificates, one for the new member and one for their sponsor.)
- 3) Separate Sponsor materials from the New Member materials.
- 4) Prepare the wording of the ceremony. *(It is customary for the club president to induct new members. It is appropriate to have a former District Officer, the Membership Committee Chair, or your Zone Chair induct new members as well.)*

MANAGING CORRESPONDENCE



LCI and the district will send Lions-related correspondence and packages to the business address of the Secretary. Note: Packages containing non-paper items and products cannot be shipped to a P. O. Box.

- Prepare and assist with the distribution of service and membership awards.
- Create minutes of BOD meetings and send draft to the club president for approval before forwarding to members.
- Send the club newsletter to all members and key district cabinet members (if not completed by Marketing Chair).
- Utilize a sign-up sheet for visiting Lions or guests. You may want to assign someone to introduce them.
- Record members who volunteer to participate in club and or community service activities.
- Send out reminder notices a week before club, zone, regional and district events.
- Communicate with the club marketing chair the operational aspects of the club (number of members, newly elected club officers, committee chairs).
- Create a monthly birthday and club anniversary list by member and date (month and date only), send to the marketing chair to include in the newsletter and the club president to announce at each meeting.

CLUB ELECTIONS



Elections are usually held at the beginning of the 4th Quarter in April.

Nominating committee provides the names of those who have been nominated for officer and director positions. The Secretary prepares the ballots for elections as per policy.

Report new incoming club officers by April 15 on the Lion Portal, or directly after the club completes its elections, report officers and directors via the Lion Portal. All incoming officers should be reported by June 15th.

The Secretary is responsible for confirming all information going into the District 2-E2 Directory and preparing for the district convention.



EVOLVING DIGITAL TOOLS



LCI utilizes the new Salesforce Lion Portal. Learn, Reports/Insights, and Shop along with additional tools and functionality, into a new unified experience called the Lion Portal. The new system offers an efficient experience (once you learn to navigate!)

NAVIGATING THE LION PORTAL written instructions

www.lions2e2.org – Under “Member” Menu

MANAGING THE CLUB ROSTER AND MEMBER CONTACT INFO



Your most important task is to maintain an accurate club roster of members. The Lion Portal serves as your main resource to ensure the roster is always an accurate listing, and that each member's contact information is kept current. There is no need to report monthly, as that is an automatic operation.

Lion Portal Club/Reports:

- Update Membership in Lion Portal
- Member Reports – Roster
- Family Unit Demographics
- Service Projects

MEMBERSHIP TYPES AND CATEGORIES



Membership Types – Regular membership and special discounted membership programs for families, college students, former Leos and young adults. Membership types determine international fees and dues levels billed to each Lion Club and its members.

Membership Categories – Provide various levels of involvement for regular club members to best fit their needs as volunteers. Local club dues may vary for these categories and those dues levels are provided for in the club's constitution and bylaws.

NAVIGATING THE LION PORTAL— MEMBERSHIP INFORMATION



**IMPORTANT!! VERY IMPORTANT!!!
EXTREMELY IMPORTANT!!!!**

Your club membership database needs to be updated every time there is a change in membership information. This includes:

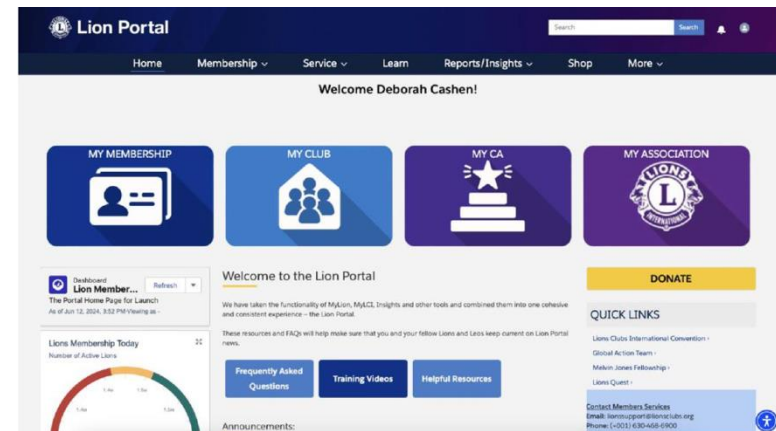
- Adding new members
- Changing member information; phone #, email or address
- Dropping members

This is your reliable source of information about your members!

Why is this important?

**YOUR CLUB IS BILLED IN JULY AND IN JANUARY
BASED ON HOW MANY MEMBERS ARE IN YOUR
CLUB! Member information needs to be updated by
June 30 and December 31.**

LIONS DISTRICT 2-E2 SECRETARY TRAINING - LCI E-BOOK



NAVIGATING THE LION PORTAL

This document contains step-by-step written instructions for an introduction to the Lions International new Salesforce Lion Portal.

**Created by District 2-E 2 - GLT Deb Cashen
(With a little help from my Pal Rick Chvalovsky at LCI)**

(After going through the Lion Portal Training please let me know how we could offer more information that will help you become familiar with this new service. This document will be available on the www.lions2e2.org website for sharing with other club members.)

PROCESSING NEWLY RECRUITED MEMBERS



Your club membership chairperson will work closely with you when adding new members to your club. When a new member joins the club, the membership chairperson will assist the member in selecting the membership category that appropriately matches their chosen level of involvement with the club.

In addition, it is important to be aware of the various membership types available through the association that provide a potential member a reduced level of international dues, including family membership, student membership and Leo to Lion membership.

Membership Application - This form may be emailed directly to a prospective new member. You may use the information from the form to add new members in the LION PORTAL. Be sure to retain a copy of all new member applications with your official club documents and make a copy to give back to the prospective member.



IN CONCLUSION



Your 2025 – 2026 Support Team

DG Michelle Greco

1st VDG Mike Lueckenhoff

2nd VDG Sean Bryan

Secretary Stan Hall

Treasurer Don Noblit

GLT – Deb Cashen

GMT – PDG John Paul Burnett

GST – Deborah Cottle

GMA – Sidonna Foust

GET – PDG Vince Rosen

As stated, this District 2-E2 Training was designed to provide Resources to the Officers of our clubs. These resources are readily available if you know where to look for them. Both the District and LCI websites are designed to provide support for those who courageously stepped forward to promote Lionism!

We thank you and greatly appreciate your dedication to LCI, District 2-E2 and especially your clubs.

We have a team available to assist you!

Please call on us!

We are here for you!

THANK YOU



THE DISTRICT 2-E2 GLOBAL ACTION TEAM

Appreciates
Your Dedication and Commitment
to:
Serving Others
Supporting Your Communities
Helping Your Clubs Stay Healthy
and Remain Active

