

Feedback from the Secretaries, Sergeants-at-Arms, and Treasurers at the District 70 Training Day, September 2003

Treasurer's Case Study #1

What can you do to make the job of your successor easier ?

1. Create an accurate list of members
2. Bank all money immediately it is received [ie next working day]
3. Update the signature card for the bank or Credit Union immediately
4. Update the signature card after elections, once the incoming Treasurer and President are known
5. Use ONE receipt book [number all receipts, either 1, 2, 3, ... or 97/1, 97/2, 97/3]
6. Prepare a Budget and use it to suggest level of fees to the rest of the executive
7. Prepare a running record of receipts and expenditure [Journal] and keep it up to date
8. Prepare a Pro-Forma for a Written Report
9. Keep all records, receipts, etc in a logical, sequential, retrievable form.

Treasurers' Case Study #2

What should you do to get your club's semi-annual return submitted to TI [copy to District 70] on time ?

1. Update the membership list immediately [don't wait for TI to send you one!]
2. Start invoicing members at the first meeting in August, personally or by mail.
3. Give verbal reminders each meeting
4. Ask the VPE to have reminders printed on the agenda
5. Bank funds as received
6. 3 weeks prior to deadline: Phone members who have not yet renewed
7. Double check the list from TI [it is not unknown for there to be mistakes] and clarify any errors, problems or omissions
8. Determine how club is going to pay:
 - Draft, or
 - Credit Cards, or
 - Using Club Funds held by TI
9. Send a copy to Patti Bertram
10. Secretary and Treasurer each keep a copy in their files.

Sergeants-at-Arms Case Study #1

You arrive late, unexpectedly, at a meeting of your own club and discover absolute chaos: the room is not set up, banner and lectern are not in place, and everyone is not quite sure what to do. What can you do to stop this recurring ?

1. Let the President or VPE know as early as possible that you will be late
2. Make sure another member has a duplicate key to the locker [on-site storage] OR
3. Make sure another member has emergency equipment [Timing cards, mini-gavel, etc]
4. Ask the IPP or other regularly attending member to be your 'double' for the job
5. Ensure each member of the club knows that it is their responsibility to welcome guests.

Sergeants-at-Arms Case Study #2

**Some clubs call it ‘meeting and greeting’, other clubs call it being the ‘meeting mentor’.
What is involved ?**

1. To meet every person coming to the Toastmasters club
2. To greet every person coming to the Toastmasters club
3. To ‘pair up’ each visitor with an experienced Toastmasters who can, quietly during the meeting, explain what is going on
4. To find out, for each visitor, an answer to these two questions:
 - *Where did you hear about us?*
 - *What do you hope to get from Toastmasters ?*
5. To make sure that every one has the means to Toast, before a Toast is proposed

Secretaries Case Study #1

How do you think you can support the President and club best ?

1. Keeping a true and accurate record
2. Making sure that mail is collected, opened and available at meetings
3. Advising of anything that is urgent received in the mail
4. Informing all club members of coming events: liaise with VPE for agenda notices
5. Keeping up your speaking and evaluating standard and continuing to make progress towards the next award
6. Making contact with special guests
7. Writing or Drafting “Thank You” notes.
8. Understudying other roles on the executive to cover in case of absence

Secretaries Case Study #2

Should you record the minutes of every club and executive committee meeting, even if there is not a Business Session ? If yes, to what detail for the meeting and the Business session ?

Yes, the Secretary should record minutes of each club and executive committee meeting. These should include:

1. time,
2. date,
3. place,
4. meeting number,
5. a copy of the circulated agenda and the actual agenda the meeting followed,
6. names of members present, visitors present and guests present,
7. apologies,
8. speeches delivered: Speaker, Title, Manual and assignment number, and Evaluator
9. meeting awards:
 - i. Best speaker
 - ii. Best evaluator
 - iii. Best Table Topics
 - iv. Best Other Assignment
10. Contest Results [if a contest was held], and
11. for a Business Session:
 - i. presence of a quorum
 - ii. minutes of previous meeting and business arising
 - iii. motions passed
 - iv. Motions on Notice