



Club Leadership Training

The National Exchange Club

Prepared By:

The National Exchange Club Leadership Development Committee



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Topic I

Club Leadership

- x Assembling Your Team
- x Model Club Organization Chart
- x Planning Your Year as Club Leader



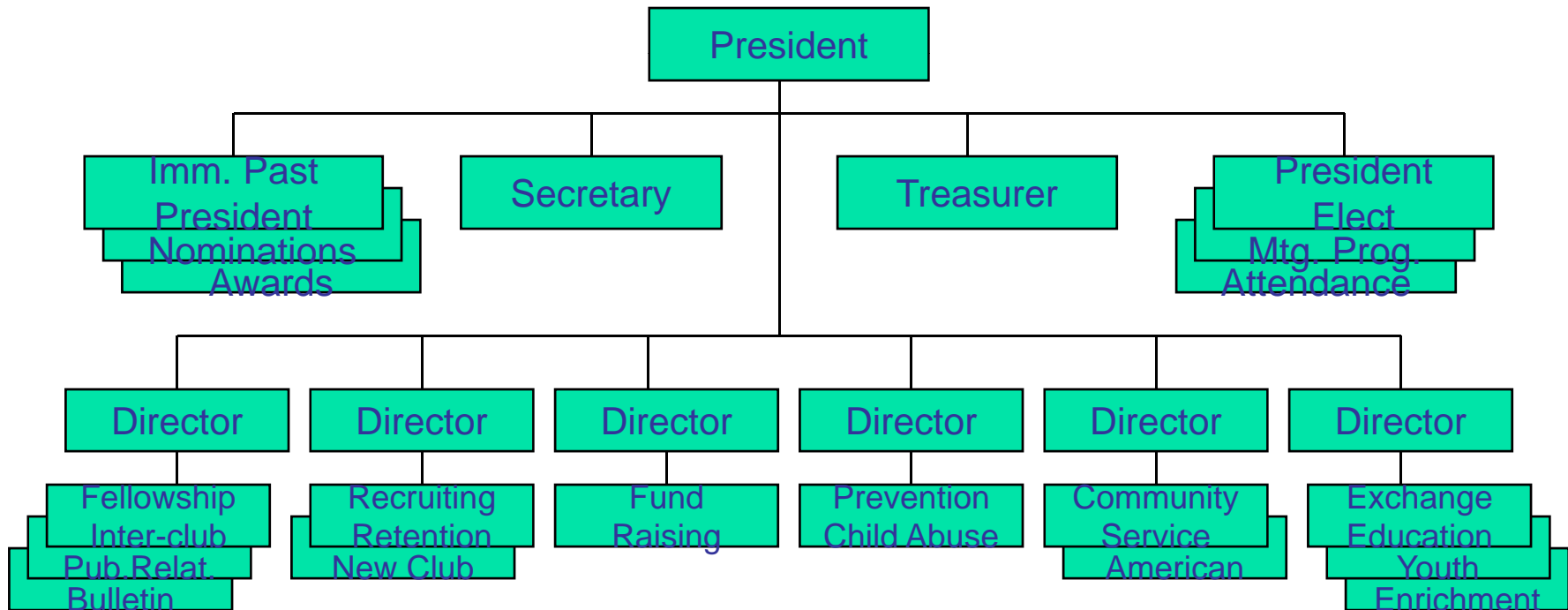
Club Leadership

- **Assembling Your Team**
 - **Nominations Committee**
 - **Conduct Elections**
 - **Appoint Standing Committee Chairs**



Club Leadership

Model Club Organization Chart





Club Leadership

■ Considerations for Planning Your Year as Club Leader

- The bylaws list the following basic purposes of a club:
 - Establish New Clubs
 - Provide personal growth and development.
 - Promote:
 - Programs of Service
 - Betterment of Community
 - Child Abuse Prevention
 - Exemplify "Unity for Service".
- The Program Development Meeting and Timeline
 - Conducted prior to new administrative year. (see Appendix)



Topic II

Training Club Officers

- x General Responsibilities
- x President
- x President-Elect
- x Immed. Past President
- x Secretary
- x Treasurer
- x Vice President



Training Club Officers



■ Club Officer Responsibilities

- The Executive Committee carries-out the following general responsibilities.
 - Attend Club Board Meetings.
 - Report Club activities to District and National.
 - Seek out and develop interested leaders.
 - Participate in the development of club growth.
 - Participate in District/National conventions and Leadership/Educational conferences.



Training Club Officers



- **Club President (CEO)**
 - **Specific Actions:**
 - Establish goals for program development.
 - Provide leadership and management training.
 - Establish an adequate financial plan/budget.
 - Secure bonding for check signers.
 - Appoint members to committees.
 - Prepare agendas for club and board meetings.

Training Club Officers



■ Club President-Elect

■ Specific Actions:

- Assist president and district director in training.
- Conduct a community needs assessment.
- Oversee membership expansion and retention.
- Prepare people for your year's leadership team.
- Perform duties as assigned by president or board.

Training Club Officers



■ Immediate Past President

■ Specific Actions:

- Oversee member committees, such as;
 - Attendance
 - Enrichment
 - Social
- Assist president-elect in preparing for president.
- Council and assist the president and board.
- Serve as chairman of nominations committee.
- Perform duties as assigned by president and board.

Training Club Officers



■ **Club Secretary** (Key Record Keeper)

■ **Specific Actions:**

- Maintain accurate records of:
 - Attendance
 - Club Activities
 - Member Activities
 - Club and Board Meetings
- Relay activities to district and national.
- Assist club president in achieving objectives.
- Receive and acknowledge all correspondence.
- Maintain library of publications and procedures.



Training Club Officers



- **Club Treasurer (Financial Officer)**
 - **Specific Actions:**
 - Collect all fees, and monies due the club.
 - Deposit/Disburse funds as directed.
 - Keep accurate records of transactions.
 - Make an annual report of club's finances.
 - Secure bond for officers handling club funds.
 - Before Nov. 15th, file FORM 990 with the IRS.



Training Club Officers



- **Vice President**
 - **Optional Position**

The position of Vice President can be appointed as a member of the Executive Committee, for the following purposes.

- During the first year of a newly chartered club, serves in the role of Immediate Past President.
- When a special program or project requires constant attention and leadership the Vice President position can serve to recognize and elevate it's importance.



Topic III

Training Club Leaders

- x Board of Directors
- x Club Committees
- x Cultivate Future Leaders
- x Trophies and Awards

Training Club Leaders



- **Club Board of Directors**

- **Leadership in Action**

- Responsible for the business affairs of the club.
 - Sets tone and pace for the year ahead.
 - Responsible for overall management of club.

- **Specific Actions:**

- Provides necessary club services.
 - Develops budget and financial policies.
 - Fill any vacancies which may occur.

Training Club Leaders



- **Club Board of Directors**

- **Membership**

- Takes the leadership role in recruiting members.
 - .Board approves candidates for membership.

- **Limitations**

- Can not alter Club, District or National Bylaws.
 - All board members have equal vote.
 - Board actions are binding.

Training Club Leaders



■ Club Board of Directors

■ Insurance

- **General Liability** - Ensure that adequate insurance is secured for any activity which could result in liability. (Mandatory)
- **Crime Insurance** - An optional crime insurance policy is available. Bylaws require secretary and treasurer be bonded. (Optional)
- **Directors/Officers Liability Insurance** - An optional liability policy is available. (Optional)

Training Club Leaders



■ Club Committees

■ Select Your Leadership Team

(Each member should have the following)

- Leadership skills.
 - Sincere interest in goals and purposes.
 - Active responsibility.
-
- Hold conference and set goals / objectives.

Training Club Leaders



■ Club Committees (Cont'd)

■ Club Committees

- The following committees are recommended for efficient club operations:
 - Program of Service
 - Child Abuse Prevention
 - Fund-raising
 - New Club Building
 - Membership Expansion and Retention
 - Public Relations
 - Awards and Member Enrichment
 - Social and Attendance

- If all suggested are not realistic, which of these would you consider sacrificing?



Training Club Leaders



■ Cultivate Future Leaders

- Provide a continual pool of capable individuals.
- Whenever interests surface, discuss opportunities.
- Involve member to develop leadership potential.
- Utilize past presidents to cultivate new leaders.



Training Club Leaders



■ Trophies and Awards

What does Awards have to do with training good club leaders?

We are not in it for the awards, but it is important to give credit where credit is due.

Classic definition leading to burn-out:

Invest a tremendous amount of energy towards an endeavor without receiving a proportional return.

Awards are not only motivational, but they bring closure by recognition and accomplishment.

Training Club Leaders



■ Trophies and Awards

- They come in the form of;
 - Pins, badges, plaques, desk ornaments, office and business implements, annuals, perpetuals, verbals and hand shakes.
 - Club Building, Membership, Community Service, the CARE Award and Child Abuse Prevention, Leadership, Publications, Public Relations, Distinguished Officers, Individuals, Team and Club.
 - Refer to the National Publication "Awards Handbook" #662.03.

Training Club Leaders



■ Trophies and Awards

Familiarize yourself with the National Exchange Club Awards Book to know all of the awards that a club and its leaders are eligible to achieve.

The Distinguished Club President Award is the one award that not only recognizes the accomplishments of the club president, but signifies that the club has had a successful year. A club must meet the following requirements.

1. Win Club Membership Achievement Award, the Big "E" Award or build a new club.
2. Conduct a program development meeting by **July 31st**, and send a copy of the report to the District Director, District President and National Headquarters by **August 15th**.
3. Earn The National Service Award.
4. Earn The Club Fund-Raising Award.



Topic IV

Program Development

- x Prepare the Program Development Meeting
- x Conduct the Program Development Meeting
- x Communicating Your Club's Plan
- x Monitor and Adjust (Follow-through)

Program Development (Part I)



- Planning the Meeting

7 Habits of Highly Effective People
by: Stephen R. Covey

- First Three Habits... The Character Habits
 - Be Pro-active
 - Begin with the End in Mind
 - Take First Things First

Program Development (Part I)



■ The “Meeting” Objectives

- Provide a clear course for year’s activities.
- Conduct prior to new administrative year.
- Hold apart from regular meeting.
- Set by Executive Committee, approved by Board.
- Membership acceptance/modification.
- Conduct with support of the club.
- Each step should allow for two-way dialogue.

Program Development

(Part I)



■ Preparation for the Meeting

- Club Leader Monthly Planner.
- Community Needs Assessment.
(See appendix).
- National Exchange Programs of Service.
- National and District Awards program.
- Promote/Encourage attendance.
- Club Program Development Meeting agenda and form. (See appendix)

Program Development (Part II)



Conduct the Meeting

- **Conduct** Prior to July 31.
- **Invite** all club members to attend
- **Expected Outcome**
 - Common Understanding
 - Team Commitment
 - Milestone Visibility
 - Membership Acceptance

- **Use** the Development Meeting Agenda
- **Share** the Community Needs Assessment
- **Present** Club Long-Range Plan and Time Line
- **Consider** the interests of members present
- **Modify** and Adjust according to consensus
- **Communicate** the Final Plan
- **Appoint** Leaders to Committee's
- **Report** to National **no later** than **August 15**.

Program Development (Part II)



- **Communicate Your Club's Plan**

- *Effective communications is vital.*

- **Communicate Internally**

- **Communicate Externally**

- **Communicate Via Many Forms:**

- Club Bulletin
- Personal correspondence
- Telephone (person to person or 3-way)
- FAX, E-Mail, ON-line Service or Internet
- Meetings

- **Communications will inspire, motivate, check and balance.**

Program Development (Part II)



Monitor and Adjust (Follow-through)

- **Have Confidence in your Team**
 - Check on progress.
 - Call upon reports.
 - Meet and adjust plan.

- **Celebrate Success** - Success breeds success.
 - Consider unique awards such as:
 - Program of the Year
 - New Comer Award
 - Membership Awards
 - Attendance Awards

Program Development (Part II)



- **Monitor and Adjust** (Follow-through)
(Continued)

- **When all is not successful;**
 - **Provide** positive encouragement.
 - **Handle** negative situations privately.
 - **Learn** from mistakes.
 - **Be** reasonable but firm; forgiving but fair.
 - **Don't** neglect appropriate corrective action. To do so is to lose respect.



Topic V

Growth, Retention and New Club Building

- x Induction (perpetual growth)
- x Orientation, Involvement, Enrichment, Retention
- x Membership and Membership Drives
- x 7 Step Plan for Rebuilding Under-Strength Clubs
- x 5 Step Pan to New Club Building



Growth, Retention and New Club Building



- **Growth & Retention**

(Induction + OIER) = GROWTH

- **Induction**

- Conduct within (2 weeks) of approval.
- Request member to sponsor in their first 90 days.
- Use the Exchange **COLONY** pin ceremony.
- Provide Member interest finder form.
- Prepare New Member Activation Form.
(See following slide)



Growth, Retention and New Club Building



NEW MEMBER ACTIVATION FORM

Member name: _____

- Paid membership fee Date _____
- Inducted Date _____
- Orientation training Date _____

Committee assignments:

- Led Pledge of Allegiance or Invocation at one or more club meetings.
- Served as a greeter at one or more club meetings.
- Passed out membership name badges at one or more club meetings.
- Served on social committee.
- Presented one or more three-minute Exchange Education segments at club meetings.
- Attended club's new member orientation program.
- Has been assigned to a service project committee.

Attendance participation

Regular meeting

Projects

Social activities

Signed _____

Human Resource Committee Member's Name



Growth, Retention and New Club Building

■ Orientation

- Conduct within (2 weeks) of Induction.
- Be sure to cover:
 - Membership Commitment Goal
 - Personal Reason for joining
 - Member Interest Finder Form.
- Use Interest Finder for involvement phase.
- If not achieved, assign duty/standing committee.
- The orientation meeting is an opportunity to move the new member to a state of involvement.



Growth, Retention and New Club Building

■ Involvement

- New member should become **I**nvolvement in first 90 days of **I**nduction.
- The **O**rientation meeting is best time to move to **I**nvolvement.
- Review interest finder and invite to committee meeting in area of interest.
- Assign non-involved members to a club duty or standing committee.



Growth, Retention and New Club Building

■ **Enrichment**

- Enrich the membership at large.
- Healthy Clubs endeavor to engage in activities.

To name just a few:

- Warm Fellowship and Friendly camaraderie
- Association with Interesting People
- Business Leads and Referrals
- Community Awareness
- Leadership Opportunities
- Fulfillment in making a difference
- Fun, Enthusiasm and Enlightenment
- Demonstration of Ideas
- Education and Informative Speakers
- Division, District and National associations



Growth, Retention and New Club Building

■ Retention

Retention is not something we do.

But rather the result or outcome of what we do.

—————
If you do what you've always done...

You'll get what you've always gotten!

■ Definition of Insanity - #1

Doing the same things over and over and
expecting different results.

■ Definition of Insanity - #2

Being aware of definition #1
and still not doing anything to change it.



Growth, Retention and New Club Building

■ Retention (Cont'd)

Active, interested members are much more likely to value and continue their membership.

Here are proven techniques for retaining members.

- **Educate:** Become familiar with objectives, history and accomplishments.
- **Involve:** Sponsor variety of activities, keep members involved in community.
- **Interest:** Meetings should be interesting, varied, good food, networking, and appropriate atmosphere.
- **Socialize:** Organize social gatherings, which spouses and guests are invited.



Growth, Retention and New Club Building

■ Membership

- Most clubs have an average attendance of 60%.

Membership	Attendance @ 60%
15	9
25	15
35	21
45	27
55	33
75	45

- Note, the 15-member club can not fill the minimum officer and director requirements.
- Even the 25-member club, does not have enough active members to fill the standing committees.



Growth , Retention and New Club Building

■ Membership Drives

- Why would a club want to grow?
 - Improve Services
 - Overcome Natural Attrition
 - Overcome Dysfunctional Losses
- Why would a member leave?
 - Never fit in, or club was cliquish
 - Never got involved
 - Club is boring or not productive
 - No organization or structure
 - No beneficial use of time and energy
 - Only socially oriented
 - Not enough social orientation
 - Burned out, not enough active members



Growth, Retention and New Club Building

■ **Membership Drives** (Cont'd)

- Become an inviting club as a way of life.
- "Everyone bring a guest", alone is not effective.

Some helpful augmentations..

- Induction Commitment (Perpetual Growth).
- Develop an "Inviting Club" attitude all year.
- Develop (Namers, Inviters, Askers) strategy.
- Determine club's biggest asset and promote it.
- Discover your members' reasons for joining.
- List benefits to inspire new prospects.
- Hold membership drive during specified time.
- Encourage, Motivate, Educate all members.
- Make it Fun.



Growth, Retention and New Club Building

■ Rebuilding Membership Drive

■ Seven Step Plan for Rebuilding Under-Strength Exchange Clubs

- 1.) Identify and Prioritize:
- 2.) Report to Headquarters:
- 3.) Assemble the Team:
- 4.) Develop the Action Plan:
- 5.) Implement the Seven Week Action Plan:
 - A.) Organization
 - B.) Program Excellence:
 - C.) New Member Plan
- 6.) Follow-Up with Feeling:
- 7.) Reward and Recognize:

(See Seven Step Plan Manual for details)



Growth, Retention and New Club Building



■ New Club Building

■ District and Club Bylaws:

- The first stated purpose of the district is:
 - Building of Local Exchange Clubs.
- The first stated purpose of the club is:
 - Actively participate in the establishment of new Exchange Clubs.



Growth, Retention and New Club Building



- **Club Building Considerations:**
 - The sponsoring club often sees an **increase** in its own membership.
 - **Two** committed sponsors should be deployed after a thorough understanding of the task.
 - New Club Building **Incentives** reward builders and club.
 - Club Building literature, supplies and experience available from **National**.
 - Try the **“5 steps to New Club Building”** manual as an organized approach to doing it faster.



Growth, Retention and New Club Building

■ New Club Building

■ 5 Steps to New Club Building

- 1.) The Commitment
- 2.) Temporary Organizational Meeting
- 3.) The Permanent Organization Process
- 4.) The Building Process
- 5.) Follow-Up/Selecting Club Activities

(See "5 Steps to New Club Building" manual for details)



Topic VI

National and District Resources

- x The District
- x The National Exchange Club

National and District Resources



The District

■ The District's Role

- Clusters of 15 clubs or more with 500 or more members, are gathered together as districts.
- District coordinates training for club officers, and assists them in setting goals and club standards.
- Bylaws list the following purposes of a district:
 - 1.) The **Building** of local Exchange Clubs.
 - 2.) Increase **Fellowship** between clubs.
 - 3.) **Strengthen** established clubs.
 - 4.) Promote of clubs in **Programs of Service**.

National and District Resources



■ District Leadership

- The District officers, and a member from each division, are elected to make up the board of directors. If needed, vice presidents may also be elected.
- Three times annually, and in most cases once per quarter, the district board meets to conduct business.

■ District Committees

- The district president appoints various district committees to plan and implement programs to assist clubs in meeting their goals. The bylaws call for the following district committees:
 - New Club Building
 - Membership and Growth
 - Inter-Club/Fellowship
 - Exchange Education
 - Convention
 - Finance

National and District Resources



■ District Convention and Conferences

- District Conventions bring together annually Exchangites from clubs throughout the district.
- Purpose is to share ideas, gain understanding and receive training on club leadership.
- Special conferences are devoted to leadership training, using the resources of the district, as well as National Officers, V.O.D. Representatives and Staff members.

■ District Leadership Forums

- Every district should hold a **Leadership Forum** sometime before June 30.
- These gatherings are specifically designed to train **incoming Club** leaders and **District** directors.



National and District Resources



■ District Finances

- Revenue for the district is generated by dues remitted by members through their club to the district treasurer.

■ District Bulletin

- Copies are distributed to every member in the district. Clubs are encouraged to regularly submit local news and story ideas to the district bulletin editor.

National and District Resources



■ The District Director

- A member of an Exchange Club in his or her division of the district.
- Represents the district in guiding, training and providing service to your club.
- District's main purpose is to render helpful assistance to Exchange Clubs in the District..
- The director develops a relationship with each club in the division and promoted inter-district activities.



National and District Resources



■ The District Director

■ Responsibilities include:

- Plan and conduct training for clubs in cooperation with club presidents.
- Work to help establish goals relating to program excellence, growth and leadership.
- Encouraging the adoption of club standards.
- Provide direction in membership activities.
- Visit clubs and report to district on the status and activities of clubs.
- Act as a communications link to clubs

National and District Resources



■ **The District Director** (Cont'd)

■ **District Director Visits**

- The district director communicate with clubs regularly and visits them as often as needed.
- Clubs with strong, active membership, may require less visits. One per quarter is typical.
- A club not meeting standards, may need and benefit from additional visits and support.
- A club visitation report is submitted to the district to monitor under-strength clubs.

■ **Information and Assistance**

District Directors are available to offer assistance, answer questions and provide useful information whenever the need arises.

National and District Resources



National Exchange Club

- **The Purpose of the National Exchange Club as stated in the Bylaws:**
 - To Charter Clubs
 - To educate, improve and develop its members.
 - To encourage, promote and supervise Exchange Clubs.

- **History**
 - The first Exchange club was formed in Detroit, Michigan, on March 27, 1911.
 - In 1913, an Exchange Club was formed in Toledo, Ohio. Soon, after that Cleveland, then Grand Rapids, Michigan.
 - In August 1917, The National Exchange Club formally incorporated as a nonprofit educational organization.
 - "Unity for Service" is the officially adopted motto of Exchange, and our official colors are blue and gold



National and District Resources



■ National Structure

- There are close to 1000 local Exchange Clubs, made up of nearly 34,000 business and professional men and women.
- The U.S. and Puerto Rico are divided into 12 regions, with two or more districts in each region.
- There are 38 districts in all, each of which is further divided into divisions.

■ National Board of Directors

- The national board of directors is composed of the national president, president-elect, treasurer, executive vice president, immediate past president and the 12 regional vice presidents.

National and District Resources



■ National Committees

- The national bylaws call for the following:
 - Jurisprudence and Laws
 - Budget and Finance
 - Special Committees

■ National Convention

- Representatives elect national officers and vote on amendments to the bylaws.
- A variety of educational seminars are presented.
- National awards are presented to deserving members, clubs and districts.

National and District Resources



- **National Exchange Club** (Cont'd)
 - **The National Exchange Club Foundation for the Prevention of Child Abuse**
 - Exchange adopted child abuse prevention as its single national project in 1979, and formed The National Exchange Club Foundation for the Prevention of Child Abuse.
 - During the 65th National Exchange Club Convention in 1983. Exchange Club members voted to approve a dues supplement to financially support a portion of the Foundation's operating budget.
 - This supplement, a sum of \$1.50 per member, per quarter, allows the National Exchange Club to support the Prevention of Child Abuse Foundation in carrying-out its mission to develop, promote and implement programs which seek to break the cycle of abuse and neglect.



Summary



- **Have FUN and SHARE it with others**

- **Fellowship, Friendship, Fanfare**
- **Unity for Service and Teamwork**
- **National Exchange Club**

NEC gives you:

- **Service, Support, Structure**
- **Hospitality, History, Home**
- **Achievement, Accomplishment, Award**
- **Resources, Results, Recognition**
- **Education, Edification, Excellence**



Summary



- Getting Results

7 Habits of Highly Effective People
by: Stephen R. Covey

Last Four Habits... The Personality Habits

- Win/Win
- Seek 1st to Understand, then to be Understood
- Synergy
- Take Time out to Sharpen the Saw



Feedback

A. Physical Arrangements

Y/N

1. The seminar room was comfortable.
2. The seminar room was organized to be a good learning environment.

B. Seminar Subject Matter

1. Overall, the subject matter was of practical value.
2. Subjects covered at the seminar met my expectations.
3. Content was consistent with program description.

C. Communication

1. There was adequate time for discussion during the presentation of topics.
2. The presenters kept the participants on-task, and kept the discussion topics moving smoothly.

D. Presenters

1. The presenters explained their topics well.
2. The presenters had a thorough knowledge of topic.
3. The presenters demonstrated effective public speaking skills.

E. Future Seminars

1. What other subjects would you like to see covered?

-
2. Do you have any ideas for improving the seminar?
-