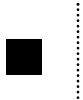


Club Presidents-Elect Workbook



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PRESIDENTS-ELECT CONFERENCE

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Accepting the Challenge

What are your challenges of being President? The President is the Chief Executive Officer of the Club. Being a President is a “people business” in motivating and managing the efforts of volunteers. The President’s job is to ask others to serve and to publicly recognize them for their efforts.

List the characteristics of a good Club leader:

Resources for Success

The Club leader has a number of resources and publications available to them for information. Review each of these and observe the information that is in them. Other resources include:

- ◆ District Governor
- ◆ Your Lieutenant Governor – The role of the Lieutenant Governor is to assist the Clubs in the Zone and to help them succeed. The Lieutenant Governor will have official contact with the Club through
 - a) Installation of incoming Club officers,
 - b) the Annual Club Planning Conference (ACPC),
 - c) four quarterly Zone meetings, and
 - d) a mid-year Club visitation.
- ◆ District Committees. Discuss the type of help they can provide and what the District Directory can do.
- ◆ *The Recognition Handbook*. Give a quick overview since this is covered in detail later.
- ◆ Other International materials are available: *Optimist International and Club Constitution and Bylaws, New Club Building Handbook, Programs and Activities literature, videos and audio tapes, Skills Development Modules and the Optimist International internet web page.*
- ◆ District Conferences and Convention to share ideas with other Clubs.
- ◆ International Convention to learn from the experts.
- ◆ Optimist International St. Louis Staff, Montréal Staff and Optimist Supply.
- ◆ *The Club President’s Answer Book* and the *Club Secretary-Treasurer Answer Book*.

Take a few minutes to review the information in the “Answer” books in detail. Your objective is to make the materials familiar to Club leaders as a source of information and assistance.



Governance: the Board of Directors actions, policy and direction represents the Club members' opinions. The President is the "Chief Executive Officer" in carrying out the direction of the Board and the Committees do the planning for the Club.

Finances: Monies raised from the community for service projects should be held in a **"Youth Fund."** Accounting wise, these monies are kept separate from the **"General Fund"** which represents funds for the purpose of Club administration.

Budget: A budget is created at the beginning of the year to give the Club administration guidance by the Board of Directors as to where and how to spend the Club's money.

Incorporation: Optimist Clubs must be incorporated as a "not for profit" organization which gives each a certain amount of autonomy of function. Most U.S. Clubs are 501(c)(4) corporations. Payment of dues may qualify as a business deduction but are not considered "charitable contributions."

U.S. Club **"Foundations"** may be incorporated as 501(c)(3) and do provide givers with deductions as a "charitable contribution." The paperwork is a bit more complex to apply for this non-profit status.

Fund Raising: Fund raisers must obey all government laws and regulations. The best fund-raisers provide high income with low investment, have minimal risk, build member morale and fellowship, and maximize Club name recognition.

Leading Your Team

T.E.A.M. – Together Everyone Achieves More

The primary job of the President is to motivate and manage the efforts of the Club volunteers. His or her ability to do this will inspire Optimists to serve in a wide variety of ways that will make a stronger, larger and more active Club.

Motivate and Manage – Being Club President can be a complex job but put simply, the President "motivates" the Club members and then "manages" their efforts. Of course the variety of this scenario changes many times during the course of a year.

"Light a fire under members (motivate) and run along beside them (manage)."

List the ways a President can motivate volunteers:

"People don't care how much you know, unless they know how much you care."

Manage the efforts of volunteers by simply **asking** them to do something in a personal way and then **recognizing** them in a very enthusiastic public way when they complete the task. Ask new members to recruit another new member. Ask a new member or an inactive member to lead the opening pledge, then recognize them for doing so. Ask a member to provide a program then recognize them for doing so. Use this pattern and you will eventually get more volunteers wanting to contribute.

When "asking," ask in a personal way. Tell the person what you want done and why they would be the one to do it. You give them the direction and resources but allow them the flexibility to tell you "how" they would like to do it.

What are the things you might ASK a member to do?

Club Presidents-Elect

With excitement and enthusiasm publicly **recognize** members who do the job. If recognition is not deserved, do not embarrass members in front of others but talk to them individually for support. The amount of recognition should be relative to the importance of the accomplishment.

List the ways a President can RECOGNIZE volunteers:

“Recognition is the ‘pay’ of volunteers – pay your members appropriately but well”

So, how do you **put together your Club “team”**? You ask volunteers in an individual way, explaining how they are needed as part of the team. You recognize them and make them feel important for being a part of the team.

Club Organization

Look at a drawing of the “Club Organizational Chart” as shown in attachment A-2. See how it works in terms of using the “team building” leadership skills discussed in the previous section. Also observe the role and function of each of the positions on the chart.

Delegating Committees

Since much of the work of the Club is done by Committee Chairs and their Committees, spend time reviewing what each Committee does for the Club.

Review a list of what each Club Standing Committee is responsible for. Fill out a sample Committee Action Plan for one of the Committees.

Youth Club Chairs are the advisors for Optimist Clubs for kids. Sponsoring a Youth Club can have one of the greatest impacts of any other project. The young people learn the value of optimism and community service. Some of the most fun projects are those in which your “Youth Club” works right along with adults on a service project.

- ◆ Alpha Clubs are for elementary students
- ◆ Junior Optimist Clubs are for junior high students
- ◆ Octagon Clubs are for high school students

The **Public Relations Chair and Bulletin Editor** are key people in that they share the information of the Club to its members and to the media in the community.

The **Club Foundation Representative** facilitates the donation of money to be used by our “Optimist International Foundation” for the benefit of the service aspect of our organization.

The **Club Director of Personal Growth** promotes, explains and encourages members to participate in the attainment of the various levels of accomplishment in the Personal Growth and Involvement (PGI) program. This “director” also keeps track of the requirements met for each level of the program.

Refer to other Committee responsibilities and resources in the *Club President’s Answer Book*.

Interest Finder

The “Member Interest Finder” is a way to find out what each of your members are interested in. Pass them out at the beginning of the year, allowing several minutes of quiet time for members to fill them out and return to you.

These are best used for personally asking members to serve on Club Committees.



Presiding at Meetings

As Club President you will preside at two types of meetings; the Club “Board of Director’s” meeting and the “General Membership” meeting.

Optimists have adopted “Robert’s Rules of Order” for official use in **parliamentary procedure**. Certainly some Clubs are more formal than others in its use. Its purpose is to allow a diversity of opinions to be expressed and considered but to allow the “majority” of the group to decide the issues. To organize discussion, a “motion” is usually “placed on the floor” for consideration and then decided “for” or “against” before moving on to the next issue. Parliamentary procedure is also used to keep a meeting moving forward with decisions rather than wasting time with unresolved discussion.

Committee meetings of the Club are usually informal but also require a process to create a plan that would include a Committee objective, a Chair and actions to be done. This action plan is then brought to the Club’s Board of Directors by the Chair for acceptance, rejection, revision or referral back to the Committee.

The Board Meeting

The function of the Board of Directors is to conduct the “**business**” of the Club. Its constitutional responsibilities are:

- ◆ To oversee projects and activities
- ◆ To oversee use of financial resources
- ◆ To approve or delete Club members
- ◆ To formulate and enforce policies

The Board of Directors **consists** of the Club President, Secretary-Treasurer, Vice Presidents and Directors. The Directors may or may not be Committee Chairs.

Monthly Committee reports to the Board of Directors build in a way to manage the efforts of Committees with accountability. The Committees do the “work” of the Club. Remember to be appreciative of their efforts. They are volunteers like you.

The Club Secretary records the meeting on the “Board Minutes” form provided. Usually just the motions and who made them are recorded. Review the sample Board meeting agenda found in the *Club President’s Answer Book*.

Your **first Board Meeting** should address the following:

- ◆ Approval of your Secretary-Treasurer appointment
- ◆ Authorization of signatures for checking accounts
- ◆ Approval of budget

A Committee Chair who has an important project coming up next week does not show up to report at a Board Meeting. What might you do as Club President?

A Committee Chair is supposed to arrange an Essay Contest with a local school official. The entry deadline has passed. What might you do as President?

Club Presidents-Elect

A Club Bulletin Editor is highly motivated but needs direction on writing a bulletin. What might you do as Club President?

A member brings a project to your Board but they turn it down because it is not consistent with the purposes of Optimist International and the Club. What might you do as Club President?

The Club Meeting

When all members get together, this is the time to have fun and enjoy the fellowship of each other. Your job as President is to make each member feel he or she is welcome and to make Club meetings fun, entertaining and informative.

As such, business is not conducted at a general membership meeting unless it is to conduct new officer elections, to change member dues or meeting locations or to address Constitution and Bylaws issues.

Planning for each meeting can be easy if you simply fill out the blank agenda found in the *President's Notebook*. These can be given to the Bulletin Editor or kept as notes by the President.

A Club meeting that has fun, fellowship and interesting programs will increase attendance and attract new members.

How can you make your Club meetings FUN?

How can you promote FELLOWSHIP at your Club meetings?

List some Club PROGRAMS that might be interesting, fun or entertaining:



Success through Growth

Why grow?

Each member also receives financial “**member benefits.**” Contact the International Offices for details.

Growth = More Service = Success

Membership

Review the **five steps** of a comprehensive membership growth program. Explain how they can be used to increase the Club membership roles.

- ◆ Participation
- ◆ Recruitment
- ◆ Induction, Orientation and Enrollment
- ◆ Maintenance and Retention
- ◆ Attendance

Explain that all you have to do to get new members is ASK.

How can you make the “new member installation” a SPECIAL ceremony?

New Club Building

Reference New Club Building Handbook

Consider the challenge of building a new Optimist Club. It makes such a huge difference in a community but can start with just a few dedicated people.

Why build a new Optimist Club?

Think about what building a new Club means to further the cause of the Optimist organization. Why would you want to build a new Optimist Club?

Review the material in the *New Club Building Handbook*. Could this be the greatest service project your Club has ever done?

List a few communities near you that would benefit from having an Optimist Club.

Sending in an “**NCB permission slip**” could get you a free New Club Building kit and reserve your right to build in that location. Recognize with enthusiasm the Presidents-Elect who indicate an interest in building a new Optimist Club.

Service to Youth

Service represents the impact that an Optimist Club can have on the lives of young people and the community. Optimists are motivated by the opportunity to make a difference in the lives of young people and in the betterment of the community.

A good service project will reflect the **interest** of the Club members and the **needs** of the youth and community. A good project will offer a chance to work together, having fun, for a good cause.

By participating in **Optimist endorsed service projects** you have access to planning and promotion materials and other Optimists to build an impact. Consider the following service projects for the coming year:

- ◆ Optimist Childhood Cancer Campaign
- ◆ JOOI Clubs (Junior Optimist and Octagon International)
- ◆ Youth Appreciation Week (November)
- ◆ Essay Contest
- ◆ Oratorical Contest
- ◆ Respect for Law/Day of Non-violence (May)
- ◆ Optimist International Junior Golf Championships (OIJGC)
- ◆ Communications Contest for the Deaf and Hard of Hearing (CCDHH)
- ◆ Youth Safety Program
- ◆ Tri-Star Sports skills contests

Personal Growth and Involvement (PGI)

The PGI program is designed for individual members to have personal growth and to meet organizational goals. It is also a program that “develops optimism as a philosophy of life.”

Recognition for completing each of ten levels of achievement are:

- ◆ Level I Bronze
- ◆ Level II Green
- ◆ Level III Burgundy
- ◆ Level IV Blue
- ◆ Level V Black
- ◆ Level VI Purple
- ◆ Level VII Gold
- ◆ Level VIII
- ◆ Level IX
- ◆ Level X Lapel Pin

Generally each level requires an individual to show accomplishment in each area of Attendance, Activity, Growth, Knowledge of the Organization, Self-Development and Communication. Each member may progress at his/her own pace.

Each member carries a **“Passport”** which guides the member through the ten levels of requirements and certification.

The benefits of the program are that it:

- ◆ Allows Club members to be recognized and appreciated for personal accomplishments
- ◆ Gives members and the Club an opportunity to learn about Optimism
- ◆ Offers personal growth opportunities to each member
- ◆ Increases member attendance and involvement in the Club



Public Information

Through the news media, public information sells the Club, its programs and activities as an asset to the community. This selling creates an impact that gains the public's support, raises members' morale, builds members' involvement and helps guarantee success.

Internal information includes:

- ◆ Club Bulletins (weekly or monthly) recognizing participation of members and creating interest for coming events
- ◆ Scrapbooks (annually) which bring pride and a sense of history for the Club President and the members
- ◆ Community Project Award (CPA) reports to share some of your best project ideas with other Optimist Clubs

External information includes:

- ◆ Press releases to local newspaper, radio and TV stations
- ◆ Posting in community bulletin boards, e-mail, etc.
- ◆ Public Service Announcements to print and broadcast media

Optimist International Recognition Program

Review the *Recognition Handbook* for the coming year. This program is designed to recognize people who achieve goals which result in a better Optimist Club and service to youth and community.

- ◆ Recognition represents a proven "road map" toward success
- ◆ Setting additional "personal" goals are also encouraged
- ◆ The real value of an award is in the effort to complete the task
- ◆ Personal "integrity" in meeting requirements is assumed.

"Honor" Club status represents good administration, growth in membership and service to youth and community.

"Distinguished" Club status represents going above and beyond Honor Club by building a new Optimist Club or adding an additional number of members.

The **"One Member Recruitment"** lapel pin recognizes an individual member who sponsors one new member into our organization.

District Recognition Program

The District **"Achievement and Awards"** Program represents friendly competition between Clubs and Zones in the District. Points are given to Clubs based on a wide variety of activities that a Club does. Evaluation and competition is usually done quarterly through the Optimist year.

List **Other District Recognition** available to Clubs:

Goal Setting

Success can be defined as making progress toward a worthy goal.

How might you define “success”?

A young contestant in an Optimist Communications Contest for the Deaf and Hard of Hearing recently summed it up with the following formula:

$$S = C + E$$

Success = Commitment + Effort

The first step toward bringing success to your Optimist Club is being committed as the President. This is a very personal concept to which only you can attest.

Goals give focus and direction for all the things you do. As an Optimist Club President you will have many opportunities and also many challenges. A keen sense of perspective, values and purpose will get you where you want to go.

Goals should be:

- ◆ Measurable
- ◆ Realistic
- ◆ Well defined
- ◆ Internalized and meaningful

What are your goals?

How many new Optimist members will you personally recruit this year? _____

How many members will your Club add to its roster this year? _____

How many members will you lose? _____

What will your Club’s “net gain” in membership be this year? _____

How many service projects will your Club conduct?

What one new and unique service project would you like to add? _____

How many of your members will achieve a new level in the PGI program? _____

Will you bring Optimism to a new community by building a new Club? _____

Where _____

When _____

Write your “**ultimate goal**” as Club President. Write a “**vision statement**” as to how this goal will be communicated. Write specifics as to how this goal will be measured.



The ACPC

ACPC is an acronym for an “**Annual Club Planning Conference**”. This is usually done before the Optimist year begins. It is a meeting between your Lieutenant Governor and your Club’s Board of Directors. During this meeting the “ACPC” form will be completed.

The **purpose** is to review “where your Club is now” so you may consider possible goals for the coming year. As you go through the process, invite responses and ideas from your new Board of Directors.

Questions and Answers

Governor’s Closing Remarks



Annual Club Planning Conference Report

The Lieutenant Governor is to conduct an Annual Club Planning Conference for each Club in the Zone and file a report within 30 days after each conference. Completion is required on or before November 15. The ACPC is a workshop meeting with the Club's Board. It may be held at a regularly scheduled or a called Board meeting. The ACPC is the required visitation for the first part of the year. See the *District Leaders' Answer Book* for complete information on conducting this conference.

Photocopy and distribute to those listed below.

# _____	# _____	<table border="1" style="display: inline-table; border-collapse: collapse;"><tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td></tr></table>					
District _____	Zone _____	Club Number					
Complete Club name _____							
President's Name _____	(____)	Res. Phone _____					
Secretary-Treasurer's Name _____	(____)	Res. Phone _____					
Lt. Gov's Name _____	(____)	Res. Phone _____					

THE QUESTIONS ON THIS FORM ARE TO BE USED AS DISCUSSION GUIDES TO AID THE LT GOV AND BOARD MEMBERS TO IMPROVE UPON THE ADMINISTRATION AND SERVICES OF THE CLUB

Number of members? _____	Club incorporation No. _____
Day & time of meetings? _____	Frequency of Club bulletin _____
Annual Dues? _____	Are Club Bylaws available? _____
New Member Initiation Fee? _____	When were Club policies last updated? _____
Has budget been approved? _____	US Clubs-When will IRS form 990 be filed? _____

Club Chair Names

Community Service _____	Fellowship _____
Director of Personal Growth _____	Finance _____
Youth Activities _____	Foundation Rep (CFR) _____
Publicity _____	Programs _____
New Club _____	Membership _____
Youth Clubs _____	Other _____

Does the Club participate in the Personal Growth and Involvement Program? _____

What Goals have been set by the Club for the year?

Net gain in membership _____	Friend of Youth Award _____
Sponsorship of new Club(s) _____	Community Service Involvement Award _____
Honor Club _____	Partner in Education Award _____
Distinguished President _____	No. of C.P.A. Entries (Honor Club requirement) _____
Sponsorship of Jr. Optimist/Octagon/Alpha Club _____	

Do you plan to present some of the 'Skills Development Modules' at Club Meetings? (examples: Creative Problem Solving, Effective Time Management, Choosing Optimism as a Philosophy of Life, Public Speaking, etc.) _____

Who will represent Club at District meetings? _____

Does Club provide financial assistance to officers who attend District & Optimist International meetings? _____

What community/youth-serving projects are planned for the year? _____

What fund-raising projects are planned for the year? _____

What amount does the Club plan to raise from fund-raising projects? \$ _____

Does your Club plan to contribute to the Optimist International Foundation? _____

Date of conference _____ Length of conference _____ hr _____ min Number of members attending _____

Signature of District officer _____

Title _____ Bus Phone (____) _____

Signature of Club officer _____

Title _____ Bus Phone (____) _____

Distribution
District Secretary - Treasurer Governor Lieutenant Governor Club File



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