

# Club Presidents-Elect Workbook



**COPYRIGHT CONSIDERATIONS:** Optimist International reserves all rights to all materials contained in this manual. Permission to photocopy, distribute and use these materials as educational supplements in Club and District training is hereby granted to all Optimist International Club Members. No other permission for any other reason is granted without prior written permission of the copyright owner.

# Club Presidents-Elect Workbook

## TABLE OF CONTENTS

Accepting the Challenge.....	4
Leading Your Team.....	4
Club Organization.....	5
Resources for Success.....	5
Board of Directors.....	6
Finances.....	6
Getting Started.....	7
Delegating Committees.....	7
Presiding at Meetings.....	7
Board Meeting.....	7
Club Meetings.....	8
First Club Meeting.....	8
Club Reports.....	8
“ Honor Club Tracking Form.....	9
Goal Setting .....	9
Success Through STAR .....	10
Membership .....	10
Service to Youth.....	11
PGI .....	11
PDP.....	12
Communication.....	12
Recognition.....	12

# Club Presidents-Elect Workbook

Keys to Success.....13

## **ATTACHMENTS**

Club Meeting Agenda

Club Officer-Elect Report

Club Organization Chart

Club President Checklist

Club Pride Report

Club Roster Adjustments

Committee Action Plans with Workplan

Dues and Fees

Honor Club Tracking Form

ICD-135 International Recognition Program

Member Interest Finder

Mission, Vision and Purposes of Optimist International

New Member Induction and Pledge

Optimist Jargon

President's Citation

Roberts Rules of Order Motions Chart

Rookie Rock Star Award form

Summary of Insurance

# Club Presidents-Elect Workbook

## Governor-Elect Address

## 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:*

## Club Organization

Look at a drawing of the “Club Organizational Chart” - 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.

## 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. The 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. The President “motivates” the Club members and then “manages” their efforts. 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.”**

# Club Presidents-Elect Workbook

**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?*

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.

## Resources for Success

The Club leader has a number of resources and publications available to them. 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 Honor Club Tracking Form
  - 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 Program*.
- ◆ Other International materials are available: *Optimist International and Club Bylaws, New Club Building Handbook, Programs and Activities literature, videos and audio tapes, Skills Development Modules, Teaching Materials, Webinars, and Publications* all found on the Optimist International website: [www.optimist.org](http://www.optimist.org).
  - ◆ District Conferences and Convention to share ideas with other Clubs.
  - ◆ International Convention to learn from the experts.
  - ◆ Optimist International St. Louis staff and Montréal staff.

# Club Presidents-Elect Workbook

## Board of Directors

The Board of Directors is the governing body of an Optimist Club. A Club's success depends on how well the Board functions, and the quality of its leadership. Club members elected to the Board must be committed to the

The following constitutes the Club Board of Directors according to the Standard Club

Bylaws:

- Six elected Directors (three elected each year for two-year terms)
- President (elected)
- Two Vice Presidents both elected each year
- Secretary-Treasurer or separate Secretary and Treasurer (appointed by the President and approved by the Board)
- Past President (serves the year immediately following his/her year as President)
- President-Elect ( if Club bylaws provide for this office)

## Duties of the Board of Directors

The Club Board of Directors is obligated to keep Club members informed. Non-Board members may attend Board meetings, make reports, and speak on various issues. However, only Board members (the official representatives of the membership) may vote on Board matters. On occasion, particularly when a project or activity is important or expensive, the Board may submit the question for non-binding or binding input. Other duties of the Board include:

- Develop the Clubs program of activities.
- Approve and supervise the budget.
- Oversee the annual verification of all Club accounts.
- Approve all proposed members.
- Develop long-term and short-term plans for the Club.
- Formulate appropriate policies.
- Submit issues to committees for detailed study.
- Receive all committee reports.
- Inform all members of Board activities by Club's news bulletin and when necessary, Club meetings.

- Activating and accelerating the work of Club committees.
- Establish disciplinary measures for members whose conduct have been deemed inappropriate or have not paid their Club dues.
- Fill vacant offices between elections.
- Identify causes for weak participation at meetings and the lost of members and take appropriate actions the correct these problems.

## Finances

Adequate financial records are as important to an Optimist Club as to a business. The Club's Secretary-Treasurer or Treasurer should establish financial records that are easily understood. 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. All financial transactions are to be reported to the Board of Directors each month.

**Budget:** The President working with the Secretary-Treasurer or Treasurer, and Board of Directors should develop a budget at the beginning of the year to provide guidance to the Club's administration to where and how to spend the Club's funds.

At best, a budget is a guidepost; compare real verses budget each month and make the necessary adjustments as required. Budget adjustments should have full Board approval and should not be made more frequently than once a quarter.

**Incorporation:** Optimist Clubs should be incorporated as not for profit organizations under the Optimist International umbrella exemption which gives each Club a certain amount of autonomy of function.

**Fund Raising:** No Optimist Club can fulfill its reason for existence, service to the community, without adequate financial resources. The extent of financial requirements depends on the nature of the Club's community-service activities. Community Support can only occur if citizens are aware of the service performed by the Club.

Your Finance Committee researches and recommends fund raising projects. The selection of the right fund raising project is extremely important. With good leadership and at least 75 percent of the members behind a project, it can be successful. After a specific project has been approved, the President appoints a Committee from the Club's membership to conduct the project.

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

# Club Presidents-Elect Workbook

## Getting Started – Things To Do

As a Club President there is a lot to do. So where do you start? Certainly there are a lot of resources and ideas available from Optimist International, your District, and Lieutenant Governor. Start with the basics and allow ideas and interests of your members to help you form a plan of action and move your Club forward. You as President are there to ask people to volunteer, guide their progress, recognize their efforts, and add value to their lives.

- Plan and conduct meeting with your Board of Directors.
- Establish your goals and objectives.
- Establish your calendar for the year.
- Select your committee chairs.
- Develop and adopt a budget.
- Conduct first regular Club meeting.
- Conduct a Club Planning session using the Honor Club Tracking form.
- Review and utilize the “Club President’s Checklist” ([www.optimist.org](http://www.optimist.org)).

## Delegating Committees

Since much of the work of the Club is done by Committee Chairs and their Committees, review 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.*

**JOI Club Chairs** are the advisors for Optimist Clubs for kids. Sponsoring a JOI 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 “JOI 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 & Professional Development** promotes, explains and encourages members to participate in the attainment of the various levels of accomplishment in the Personal Growth and Involvement (PGI) Program and the Professional Development Program (PDP). This “director” also keeps track of the requirements met for each level of both programs.

**Club Fellowship Chair**- creates opportunities to make Members feel welcome. Identify opportunities for both Club meeting social activities that are fun, entertainment and informative.

Refer to other Committee responsibilities and resources on [www.optimist.org](http://www.optimist.org).

## 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 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.

# Club Presidents-Elect Workbook

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 on the websites.

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?*

*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 Bylaw issues.

Planning for each meeting can be easy if you simply complete an agenda. It 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.

## **First Club Meeting**

- Brief report on the International Convention and/or District Convention
- Goals and objectives for the year
- Announce committee chairs and appointments

*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.*

## **Club Reports**

Districts and Optimist International require a minimal number of reports and provide the necessary forms, as well as the convenience in some cases of filing them electronically.

Accurate and timely reporting provides a vital link between Clubs, District and the International Office. Complete and “on time” reports present a concise picture of Club progress and growth, and aid District officers in generating the most effective kind of assistance and guidance.

Club reports include the following:

- **Club Roster Adjustments (CRA)** - The Club Roster Adjustment form provides the Club an opportunity to make membership additions, deletions and address changes at any time during the administrative year. It also provides for reporting changes in President, Secretary-Treasurer, and spelling corrections.



# Club Presidents-Elect Workbook

• **Club Pride Report** - Clubs must submit a Club Pride Report to Optimist International by August 31. When completed, the report should accurately reflect all the activities sponsored by the Club or in which the Club participated for the year just completed. This form is available online at [www.optimist.org](http://www.optimist.org).

• **Club Officer-Elect Report** - Clubs must submit a Club Officer-Elect Report, either on the official form or electronically, to the International Office no later than May 20 or immediately after a change occurs. The names and addresses of the President- Designate and Secretary-Treasurer-Designate are to be reported on this form. To access the form electronically, go to [www.optimist.org](http://www.optimist.org).

• **JOI Club Reports and Awards** - Clubs that sponsor Alpha, Junior Optimist and/or Octagon Clubs must file Officer-Elect Reports by May 30. Club rosters are due by October 1. Both reports are filed with the International Office. Club awards are listed in the annual Youth Clubs Planning Guide. Deadlines vary from May 30 to September 30.

## The Honor Club Tracking form

The **Honor Club Tracking form** is a vital tool to getting buy-in of your leadership and Board and assists in determining the current status of the Club. This is usually done before the Optimist year begins

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.

The advantages of the Honor Club Tracking form

- Provides a basic plan for the Club’s activities
- Identify the specific needs to be addressed by the Club
- Provide a list of Club leaders
- Confirm the organizational structure of the Club
- Help identify missing roles and functions
- Provide important information to the District
- Inform members of the Board of Directors
- Establish a relationship between the Lieutenant Governor and Club’s Board of Directors
- Help to establish and consensus for Club activities during the year

## Goal Setting

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

*How might you define “success”?*

Whether your Club is large or small, the overall success of the Club will depend on the ability of the members to set and achieve goals. SMART goals can point a Club in a specific direction to achieve success. What are SMART goals?

**Specific**  
**Measurable**  
**Attainable**  
**Relevant**  
**Time-Based**

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 also be:

- ◆ Realistic
- ◆ Internalized and meaningful

### What are your goals?

- 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?  
\_\_\_\_\_
- How many of your members will achieve a new level in the PDP Program?  
\_\_\_\_\_

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.

# Club Presidents-Elect Workbook

The first step toward bringing success to your Optimist Club is being engaged and committed as the President. Your Club and Club Members are the stars in Optimist International. This is a very personal concept to which only you can attest.

## **iMagine**

- A better place for all children with every child having food and a bed to sleep in
- A child who believes he/she can succeed
- A community with people helping each other

## **Success through STAR**

STAR for your Club and Club Members:

Service  
Training  
Administration  
Recognition

*Why engage your members in Service and Activities?*

*Why train your members?*

*Why run your club efficiently?*

*Why recognize your members?*

Success through STAR (Service, Training, Administration and Recognition) = Growth

**Growth = More Service = Success**

## **Membership**

Review the **-steps** of a comprehensive membership growth program. How can they be used to increase the Club membership roles?

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

Be aware you will experience a loss of members. Some turnover is a normal part of a healthy Club. The key is to continue to grow your membership and is critical to the success of your Club. Many losses are due to uncontrollable reasons.

All you have to do to get new members is ASK.

*How can you make the "new member installation" a SPECIAL ceremony?*

*What are some uncontrollable issues to cause a loss of members?*

*What are some controllable issues and how can you avoid them?*

## **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:

- ◆ Internet Safety Program
- ◆ Childhood Health & Wellness
- ◆ JOI Clubs (Junior Optimist International)
- ◆ Youth Appreciation
- ◆ Essay Contest
- ◆ Oratorical Contest
- ◆ Respect for Law/Promotion of Non-violence
- ◆ Optimist International Junior Golf Championships (OIJGC)
- ◆ Communications Contest for the Deaf and Hard of Hearing (CCDHH)
- ◆ Youth Safety Program
- ◆ Tri-Star Sports

# Club Presidents-Elect Workbook

## **Personal Growth & Involvement (PGI) Program**

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 colored backing
- Level II Green colored backing
- Level III Burgundy colored backing
- Level IV Blue colored backing
- Level V Black colored backing
- Level VI Purple colored backing
- Level VII Gold colored backing
- Level VIII Orange colored backing
- Level IX Yellow colored backing
- Level X Lapel Pin

Generally, each level requires an individual to show accomplishments in each area of attendance, activity, growth, knowledge of the organization, self development, and communication. Certification for each level is made by the Club President, Secretary- Treasurer or Club Director of Personal Growth. Each member may progress at his/her own pace.

Each member has a passport which guides them through the ten levels of achievement 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

## **Professional Development Program (PDP)**

The PDP program is designed to enable people to grow as individuals, career professionals and Optimists. Similar to the PGI program, the PDP program has 13 levels that focus on the areas of Project Management, Marketing, Continuous Improvement and Communication Skills.

Completion of each level of the PDP is certified by either members of the Club, Zone or District and is recognized with a certificate for levels 1-10 and by a bronze, silver or gold pin for levels 11-13.

All members can participate in the PDP program just like the PGI program.

More information on both programs is available on the Optimist Leaders website.

## **Communication**

Through the media, public information sells the Club, its programs and activities as an asset to the community. Effective communication will have an impact on the success of a Club.

**Internal** information includes:

- ◆ Send out regular emails (minimum of monthly).
- ◆ Club Bulletins via the internet 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
- ◆ Regular posting on Social Media platforms

**External** information includes:

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

*List ways to improve communication within your Club:*

*List ways to improve communication in the community about your Club:*

# Club Presidents-Elect Workbook

## Optimist International Recognition Program

Review the *Recognition Program* 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.

### Club Recognition

#### “Bringing out the Best” Club

(Banner patch then year bar thereafter)

- Complete at least two service projects a year
- Complete the Club Pride Report
- Be Current on District and OI Dues
- Add two or more members
- Conduct a Membership Recruitment Drive (i.e. NOW Program)
- Recognize a Club member or local community individual

#### Honor Club

(Banner patch, year bar with Club President’s name and year; thereafter a year bar with Club President’s name)

- Complete three or more service projects a year
- Complete Club Pride Report and Club Officer-Elect form
- Recognize a Club member or local community individual
- Grow Club by Net of plus 3 in membership
- Appoint a Club Foundation Representative and make a non-restricted contribution to the OIF or CCOF
- Conduct a Membership Recruitment Drive (i.e. NOW Program)
- Club President, Club President-Elect (or two Designees) attend District Convention (or two other District meetings/conferences)
- Be current on District and Optimist International dues

#### Distinguished Club

(Watch for Club President and Secretary and/or Treasurer, a banner patch with the Club President’s name; thereafter a year bar with Club President’s name and watch)

- Meet Honor Club Criteria plus one of the following:
  - ... Add Net plus 15 in membership OR
  - ...Build one or more a new Clubs OR
  - ...Increase by Net plus 8 and build two or more JOI Clubs

### 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:*

## Keys to Success

A leader must always:

- Plan for the worst and inspire for the best
- Work to create a positive climate
- Persevere against all odds
- Develop and teach
- Strive to become the person you would like to work with
- See challenges nor barriers
- Be governed by the hope of success not by the specter of failure
- Inspire positive thinking in your team
- Eliminate all rumors in your team
- Act as an exemplary team member no matter how they feel
- Believe in their team at all time
- Accept the responsibility for the success of failure of the team
- Accept, recognize, and appreciate your team members
- Look out for synergy everywhere and with everyone
- Leave your ego at the starting line
- Ask and accept help – It is a gift for the one who wants to help
- Give the credit to someone else
- Inspire your team by giving them the opportunity to take charge and by asking them for advice
- Know when to lead and when to manage

## Questions and Answers

# Club Presidents-Elect Workbook

**Closing Remarks**

# Club Presidents-Elect Workbook



**Optimist**  
**INTERNATIONAL**

**Optimist International  
4494 Lindell Boulevard  
St. Louis MO 63108  
800-500-8130 or 314-371-6000  
Fax: 314-371-6006  
[www.optimist.org](http://www.optimist.org)**