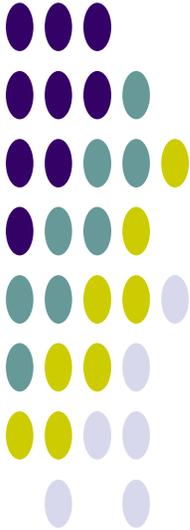


Club President Leadership Manual



Civitan International

The greatest factor in the success of a Civitan club is the effectiveness of the club leadership. As club president having strong, effective, **optimistic and confident leadership style** is vital. Your talents and skills should **create an atmosphere of teamwork** among your members while effectively managing club activities and operations.

Primary Responsibilities

- **Preside effectively at all meetings** - Each club and board meeting should be well planned and organized. Meetings should flow smoothly and end on time.
- **Plan – The President Calendar and Honor Club Application** should be your roadmap to success.
- **Appoint all committees** – The process you utilize to select committee chairs and the type of continuing relationship you establish with those selected are of critical importance to the club's success.
- **Prepare a club budget** – Make certain the budget is completed and approved by the board of directors October 1.
- **Represent your club at district and international conventions** – Attend and encourage others to attend the International convention and all district functions.

General

- **Evaluate club's membership, operations, and projects** - The best time to conduct this function is **two months before taking office** and in cooperation with the current president and board.
- **Recognize the importance of increasing club membership** – **Make sure all members are active in recruiting new members since they are the lifeblood of the club.**
- **Understand the responsibilities of your leadership team** – **The action or inaction of your club officers has a significant effect on your ability to reach the goals** the club has set for the year.
- **Delegate responsibilities to others** – Great leaders foster leadership in others.
- **Involve your members** – As a leader you must create relationships with your membership so you can better understand the strengths and talents of each person.
- **Understand the significant role of the club president** – No position is more important in your club.
- **Identify and resolve problems** – Establish a climate of enthusiasm and openness.

Preside effectively at all meetings

Since people have many demands on how they spend their time these days, suffering through a “bad” or “boring” meeting will quickly result in avoiding such meetings altogether. As the meeting leader, your performance is essential to insure members believe their time has been well spent and look forward to returning to the club environment. The basic skills of meeting management are not difficult to master, but preparation is required.

- **Prepare an agenda.** An agenda is put together a day or two before the meeting after talking with your leadership team (board and committee chairpersons).
- **List the person(s) responsible for each item on the agenda.** Make sure the people listed on the agenda know they will have to be prepared for the meeting. Don't wait until five minutes before the meeting to do this.
- **Begin the meeting on time.** When you wait for the latecomers it rewards their tardiness.
- **Speak clearly and loudly** enough to be heard by everyone in the room.
- **Follow the agenda and keep the meeting on track.**
- **Listen to what others' are saying during the meeting.** As the club leader you are responsible for leading the meeting, not dominating it.
- **Summarize decisions made during the meeting and review who is responsible for actions to be taken. Identify items for the next business meeting** or items that go to committees or the Board for further action. You may want to ask the secretary to assist you in tracking this.
- **End the meeting on time.** Civitan members are busy people with other obligations. Ending on time reduces the need for members to leave before you have completed the agenda.

Different types of meetings:

- **Club meetings - A structured agenda** with an emphasis on announcements, programs, and opportunities to volunteer for projects. Held weekly, bi-weekly or monthly.
- **Board or business meetings** - A predetermined agenda focused another on activities being planned, discussion of issues raised by members, etc. Held monthly.
- **Planning meetings** – This type of meeting is directed on situation analysis, problem-solving, and decision-making. *Held annually or semi-annually.*
- **Brainstorming meetings** – This meeting may be held in conjunction with planning meetings. It is the least structured of the meeting types and emphasis is on getting as many ideas as possible on a particular topic or issue such as membership growth or fundraising. **Held prior to October 1.**

Club Meeting Agenda

Month 11, 20XX **YOUR Civitan Club** **Agenda**

Call the meeting to order

Pledge

Invocation or Moment of Silence

The Civitan Creed

Recognition of Guests

Member Related Announcements
(birthdays recognition, special events, etc.)

Project Reports:

Service: Project name, date, time, location

Knowledge: New Member Orientation,
Speakers, Conventions

Fellowship: Social name, date, location

Program:

Speech Name
Speaker Name

Next Meeting: Date & Time



Building Good Citizenship Since 1917

Board Meeting Agenda

Month 11, 200X YOUR Civitan Club Board Meeting Agenda

Welcome

Recognition of Guests

Secretary Report

- Minutes
- New Members

Treasurer Report

- Account Balances
- Restricted Accounts
- Budget
- Invoicing

Old Business

New Business

Project Reports:

Service:

Fruit Cake Report

Candy Box Report

Project Name

Knowledge: New Member Orientation,
Speakers, District Meetings, Conventions

Fellowship: *Social name, date, location*

Next Meetings Plans, Speakers

Next Board Meeting Date and Time

Open Floor

Adjournment



Building Good Citizenship Since 1917

Plan

To insure that your time and energies are used wisely, you and your leadership team must **plan for your year in office**. There are no truer words spoken than if you plan to fail, you may; but if you fail to plan; you will.

Year after year, presidents who lead their club to a successful year planned and set goals by using the President Planning Calendar and Honor Club application as a roadmap. A copy of both is included with this training manual or is available online at www.civitan.com.

Appoint all committees

As president, you will appoint all committees and are an *ex-officio member of these committees*. Your club's committees should plan, promote and implement activities and projects to carry out your club's goals. You need to closely monitor the activities and progress of each committee and provide motivation and leadership when necessary.

Responsibilities

Collaborating with your committees will prove to be a valuable aspect of your presidency. As president, you have the following responsibilities:

- **Make committee appointments as soon as possible after your election to office.** This will allow your committees to plan their work so that your administration can begin.
- Although the appointment of all committees and committee chairpersons is your responsibility it is often advisable and helpful to **seek the counsel of your Board of Directors in making these appointments.** This should be done at a special meeting of your board well in advance of October 1.
- **Suggest regular meetings** for all committees at specified times and attend as many as possible.
- **Request periodic reports** to stimulate definite action from the committees. It is recommended reports be written, read, and then submitted to the secretary for the year's permanent record. Since valuable meeting time can be consumed in "rambling reports," make sure **reports are brief**.

Club Committee Structure

Your club **committee structure should support your club's goals and objectives** for the year. Committees have specific responsibilities with the power to carry them out. There are certain committees essential to the functioning of a club and a brief description of each follows:

- **Budget and Finance** - This committee should prepare a budget of the estimated income and expenses of the club for the year. **At the end of the fiscal year (in the month of September)**, this committee should request an audit of the books to be made.

- **Programs** - This committee should provide club meeting programs that stimulate the membership, attract prospects, and make Civitans better informed citizens. A master plan can be set up for the year's programs, with special dates earmarked for special programs. The president-elect should work closely with this committee.

Well-planned programs, properly presented, insure an active, interested membership and well-attended meetings. They stimulate member interest and interest in prospects. They provide the basis for accomplishing one of Civitan's major purposes: acquiring a broader knowledge of public affairs and community needs.

- **Membership** - One of the president's most important duties is the appointment of a **strong, well-balanced membership committee**. This should be the **most active committee of the club**. The chairperson should be a devoted Civitan, a good organizer, and he should be comfortable in approaching individuals. A successful sales oriented person would be a valuable chairperson for this position.

As strong as this committee must be and as important a role as it must play in the growth of your club, the president must additionally stress in very strong terms **each individual member has a responsibility in attracting new members**.

The planning and successful execution of a program to **increase club membership is, of course, the primary objective of the membership committee**. A dynamic tool for the committee is the **Membership Meeting**. Your membership committee can receive complete information by ordering the *Adding to Your Club's Success* manual from Civitan International.

- **Service Projects - This is the very heart of Civitan and its reason for existence**. Having a good project, or projects, is a rallying point for the club. There should be a diversified and flexible program of projects, one in which all members can participate. Each member may have a favorite project; but by keeping the club working as a unit, everyone will be interested.

It is imperative for this committee to be constantly open to new ideas. The more diverse the club's project undertaking, the better it reflects the needs of club members. Too many Civitan clubs take the community service approach of performing the same projects year-in and year-out. Often those projects are deemed "important" by club leaders or are considered "safe" because they have been done previously. Any attempt by members to move the club outside of this self-imposed "box" are usually met with resistance or ambivalence. If such phrases as "we've never done that before" or "that's not the type project we do in this club" strike a familiar chord, it is important the committee try to change this direction. In any club, limited service opportunities usually result in decreasing membership. Take responsibility in changing this.

- **Fund Raising Committee**
Fund raising is one of the most important activities of a Civitan club. Quite obviously, successfully completed projects that produce income for the club enable your group to extend its service to the larger community.
- **Publicity** - This committee should disseminate all interesting information furnished by the officers of the club, chairperson of various committees, district officers or Civitan

International. This committee should also furnish the editor of *Civitan Magazine* news items for publication promptly while it still has “news value.”

If this committee has charge of the club bulletin, remember that a club bulletin is the mouthpiece of the club. It should announce club meetings and programs; it should publicize worthwhile projects of the club and the district. It is the outlet for club news. It brings members closer together through notes on members' accomplishments and activities.

Prepare a club budget

A budget is prepared to indicate the major areas of income and expense. It also encourages sound handling of the club's financial affairs, and is one of the ways you and your leadership team can look at what the club is doing and make decisions about what to continue, what to change, and what to eliminate.

In many clubs it is the **Budget and Finance Committee that will help you prepare the budget.** The immediate past president and the treasurer can also assist in the preparation of the budget.

Since you may have questions about preparing the annual budget, let's look at an 8-step model of budget preparation:

- **Identify your club's service areas and the goals** for each area.
- **Determine the amount of money the club has available for all of its activities during the Civitan year.**
- **Ask each of the standing committees to give you a tentative committee budget** for the year. Encourage the committees to identify new and alternative funding if they are proposing something new and different.
- **Compare the requests** of each committee with the monies available.
- **If there is enough money, approve the budget of each committee.** If the requests exceed the amount of money available, meet with each committee chairperson to discuss ways to reduce the budget request.
- List the committees and their budgets, administrative expenses, etc., in preparing the final version of the annual budget.
- **Share the tentative budget with the board for their input or approval. After the board has approved the budget, publish it in your club's newsletter so the club members understand what it takes to achieve the goals of the club.**
- **Remember, a budget is a planning tool and can be amended by the board at any time with formal action.**

Sample Club Budget

**Civitan Club Name
Budget 200X – 200X**

Operating Revenue (See details below) \$ _____

Project Revenue (See details on project budget) \$ _____

Total Revenue \$ _____

Operating Expenses (See details below) \$ _____

Project Expenses (See details on project budget) \$ _____

Total Expenses \$ _____

Total Operating/Project Profit/Loss \$ _____

=====

Operating Revenue

Initiation Fees \$ _____

Club Dues \$ _____

Meals \$ _____

Raffles/Fines \$ _____

Donations \$ _____

Miscellaneous \$ _____

Total Operating Revenue \$ _____

Operating Expenses

District Dues \$ _____

International Dues \$ _____

Insurance \$ _____

Meals \$ _____

Banquets \$ _____

Awards/Plaques \$ _____

Officer Training \$ _____

District/International Meetings/Conventions \$ _____

New Member Recruitment \$ _____

Chamber of Commerce Membership \$ _____

Stationary, etc. \$ _____

Newsletter \$ _____

Postage, PO Box fees \$ _____

Bank Charges \$ _____

T-Shirts, Logo items \$ _____

Speaker gifts \$ _____

Legal Fees \$ _____

Total Operating Expenses \$ _____

Net Operating Profit/Loss \$ _____

Civitan Club Name
Project Budget 200X – 200X

Project Revenue

Candy Box Income net after 75% to Int'l	\$ _____
Coin Box Income net after 50% to Int'l	\$ _____
Fruitcake Income	\$ _____
Project A	\$ _____
Project B	\$ _____
Project C	\$ _____
Total Project Revenue	\$ _____

Project Expenses

Project A	\$ _____
Project B	\$ _____
Project C	\$ _____
Total Project Expenses	\$ _____
Net Project Profit/Loss	\$ _____

Donations to Charities

Civitans at the Helm	\$ _____
Junior Civitan	\$ _____
Fellow	\$ _____
Other	\$ _____
Total Donations to Charities	\$ _____

Represent your club at district and international conventions

The purpose of district and international conventions is to celebrate achievements, promote fellowship and share service ideas and strategies to strengthen club and district programs. There is no better venue to interact with other Civitans and also develop an understanding of the imperative role Civitan International and your district can have in your local club.

Evaluate club's membership, operations, and projects

In today's changing world we are constantly reminded that **membership involvement or renewal isn't automatic**. With our current environment of constrained economic growth, competition for scarce time, money and attention, as a club leader you must constantly evaluate the needs of the club, the members and the community to ensure you are meeting those needs.

Each year a club's board should evaluate the club's condition, activities, and operations by asking the following questions. The best time to conduct this function is at the end of the fiscal year bringing the out-going board and new board together for an annual joint meeting. However, a board may conduct this exercise at any time since the more efficient a club is, the better it meets the needs of its members and the greater the impact it has on the community.

Membership

- Has there been an increase or decrease in our membership in the last year?
- How many members did we have 3-5 years ago?
- Are we experiencing a continual decrease in our membership?
- What is the size of our club? Is our membership level below 20, 20-30, 30 or more?
- How many members are actually participating?
- What are our plans to increase our membership this year?

Operations

- How does the club survey its members to ensure activities are **meeting members' needs**?
- **Are members given an opportunity to be heard** regardless of years of service or status?
- What five things has our club done differently or new in the last two years? Make a list.
- Why do members drop out of our club? Make list and evaluate.
- Why would someone choose to join our Civitan club? Make a list.
- Does our club have one or more cliques?
- Are we relying on the same members as leaders year after year?
- Does our club offer programs that inform, inspire, and entertain our members?
- What forms of communication do we use to contact our members? Make a list.
- Do our members receive timely information about upcoming projects?
- What are our fellowship or social events? Make a list and evaluate.
- In what events do we include members' families?
- Do the leaders encourage new project ideas from the members?
- What positions in our club are least popular? Make list and discuss solution for improvement.

Projects

List all community and fund-raising projects and then ask these questions:

- Do our leaders/members seek information on unmet or new community needs?
- How many community projects are the same ones conducted five years ago?
- How many projects are new over the last five years?
- Has the community changed since we initiated our projects?
- Are members interested, supportive, and actively participating in projects or are their pet projects that one or two members push?

Recognize the importance of increasing club membership

Have you ever asked yourself why your Civitan club was established? Do you know the history of your club—when it was chartered? What were some of the first projects the club did in the community? Understanding these things will aid you in understanding why increasing club membership is important. Ask yourself if you would be president or even a member of the club if adding members weren't important.

You may be thinking, why should I be concerned with increasing the club's membership?

Here are just a few reasons:

- New members provide more resources and additional “working hands” in the community. New members allow your club to do far more in the community than it could with just a hand-full of members.
- Increasing membership **expands the leadership pool of the club**. With more members, the club might eliminate “recycled” leadership positions (the same individual serving year after year).
- Involving new members in the club will **prevent “burn out”** of existing members who continue to do most of the work. With an increased membership base, the activities of the club can be delegated among a larger group of people.
- New ideas and **enthusiasm will be brought to the club** by adding new members. Enhancing the club with fresh changes may even bring back inactive members who left the club because of the “same old things.”

Above are just a few of the benefits that new members can bring to a club environment. Most Civitan clubs that flourish do so because of new members. A recruitment manual, *Adding Success to Your Club*, is available through the Supply Catalog and offers step-by-step guidelines on how to add new members to your club.

Understand the responsibilities of your leadership team

As a leader, you need to **know the strengths and weaknesses of your leadership team**. The action or inaction of your club officers has a significant effect on your ability to reach the goals the club has set for the year. Let's look at the **information your officers should be reporting to you** and the responsibilities of their office.

- **President-Elect** - The president-elect is the officer with whom you will closely work with. He or she should be involved in learning about the role of club president, while planning how he or she will serve when in the position next year. The president-elect should be presiding at meetings you cannot attend and be present at each board meeting. Additional responsibilities of the President Elect include the orientation of new members, ensuring the club has interesting club programs, evaluating and implementing the use of electronic communications within the club and participating on the club's board of directors.
- **Treasurer** - The club treasurer is responsible for successfully managing the basic financial procedures of the club. He or she is responsible for sending out dues invoices in a timely manner, presenting reports to the club and board of directors regarding the financial position and monitoring balances of accounts to make certain the club is not exceeding the budget. The treasurer also ensures that payments and deposits are made promptly from and into the correct accounts and reconciles the club's books every month, record details of all receipts, deposits, and payments in the appropriate club records and file the appropriate local, state, or federal tax forms (as may be required)
- **Secretary** - The club secretary should keep an accurate roster of club membership, submit reports to Civitan International concerning any changes in club membership (additions, deletion, address changes) and keep the board informed about members who missed the last regular club meeting. The secretary is also responsible for maintaining a file of minutes of all general club meetings and distributing the board minutes in advance of the monthly board meeting. He or she should also order and keep track of the supplies needed by the club and report new club officers to Civitan International by July 1.
- **Directors** - The board of directors has the opportunity to set the general tone and pace for the year and is responsible for the overall management of the club. It is made up of the immediate past president, president, president-elect, secretary and treasurer and elected directors (number of directors is dependent on club by-laws) A director is responsible for supporting the leadership team by assisting in the planning, goal setting and implementation of the plan to achieve the overall goals of the club. The board approves projects that are within the goals of the club presented by the projects committee and appropriate all funds of the club in accordance with the club's budget.

Delegate responsibilities to others

There are three reasons you will delegate responsibilities to members: 1) to help the club member learn new skills, 2) to involve your membership in leadership activities, and 3) to reduce the need for you to control. You'll notice that none of the reasons is "to get rid of something you don't want to do." Effective leaders know that they will be more successful when the people they work with are able to undertake a broad range of responsibilities. Delegation is one way club members understand what it takes to lead a club successfully.

Leaders know that effective delegation involves at least the following four steps:

- A **clear, concise statement of the assignment** including performance standards and completion date.

- **Allocation of necessary resources** such as money, information, and decision-making power.
- **Constant encouragement and motivation without interference of control.**
- **Agreed-upon checkpoints or meeting times to assess progress, provide feedback, and/or revise assignment.**

When you delegate a responsibility to another club member, it's important to realize that the member may not do it exactly the way you would do it. Remember that delegation frees you from some tasks and helps the other person learn new skills. *Delegation is not about you; it's about growing new Civitan leaders.*

Involve your members

Give your leaders and members something significant to do. The president should talk to all members by phone or meet personally with him or her and ask what they would like to do. Ask members what they think is valuable and important, and listen to them. This gives members a sense of ownership, and **people support what they help to create.**

Make participation highly visible (who, when, what they are doing). Use lots of names in the club bulletin. Call on **committees to make brief progress reports at meetings.** This makes non-participants highly conspicuous by their absence from progress reports, recognition ceremonies, and the work itself.

People are motivated to action when they have a stake in the outcome of an activity. When one chairs a committee, rewrites the by-laws, raises funds, he or she cares about the way things are done and the way they turn out. The more you do – the more you want to do and the more you care. The less you do – the less you want to do and the less you care about what others attempt or the outcome.

Understand the Significant Role of the Club President

No position is more important in your club than the one you have chosen to fill during the next 12 months. The amount of **effort, planning, and enthusiasm** you give, will determine your success as president as well as the overall success of your club, perhaps for many years to come. If you do nothing, it's likely nothing will happen or change in your club. If you do something, perhaps a few things will come to pass. If you do your best by **working with others**, you *will* make a difference in the future of your club.

Serving as club president can be fulfilling, fun, and quite a rewarding experience. Presiding at meetings, delegating, planning, collaborating with club members, and communicating are all elements you will learn to master. For these reasons alone, serving as club president should be an experience that will not only enhance your life professionally but personally!

Identify and resolve problems

In settings where a group of diverse people with various ideas and opinions work together, there will always be difference of opinions. Conflict can be healthy and even invigorating when it brings out new thoughts and ideas; however, **unresolved conflict can be like a**

cancer festering within a club. It's very important for the **leaders or leader to sense the initial stirring of conflict** so it can be managed early.

Problems can range from one disruptive member to the general club membership in conflict disagreeing on a matter at hand. Each should be handled somewhat differently.

Dealing with individual complaints

- Evaluate each complaint to **find its core**. Some complaints are like volcanic eruptions—the mixture might contain many basic complaints, some important, some trivial. Ask yourself, “**What information do I need to extract from this complaint?**”
- **Evaluate the complainer**. Not all complainers are created equal. A handful of chronic complainers will find fault with everything. It's tempting to ignore these hard-to-please people but, if you can satisfy them, you can please just about anyone.
- **Ask, “What can I do to make this right?”** Do not volunteer to do anything before you ask this magic question. The complainer might not want as much as you're prepared to offer.
- **If there's nothing “do-able” in a complaint, simply recognize the person's right to complain**. Realize that there is probably nothing you can do to satisfy him/her. **A small percentage of people won't like you, no matter how hard you try**. Thank them for taking the time to complain and follow your instincts.
- **If the problem persists, conduct a special closed club board of directors meeting**. Notify the member in question about the meeting and discuss the situation openly. Hopefully, the situation can be remedied within this setting.

Dealing with a conflict within the general membership

- **Conduct a club assessment**. **Survey** your members as to their thoughts on the issue. Members will be much more open about their feelings confidentially than in an open forum.
- **If the survey indicates the majority of the membership is concerned, seek outside assistance**. Perhaps the outside resource might be your Lt. Governor, District/Area Director or District Governor. **Whomever you choose, make sure it is someone capable of facilitating the meeting and someone who is not a member of your club**. Conduct an open forum and discuss possible solutions to the problem.
- **If the meeting proves to be successful, implement the solution. If no consensus is reached, take the suggestions from the meeting and hold a special board of directors meeting. Vote on the suggestion that best serves the club as a whole.**