



## Training Outline: Club President

This training outline is designed for incoming Club Presidents of the California/Nevada District Exchange Clubs. It aims to equip them with the essential knowledge, skills, and resources needed to effectively lead their club in alignment with the National Exchange Club's mission, vision, and core values. This outline emphasizes collaboration with district leadership and utilization of available national resources.

### Module 1: Understanding the National Exchange Club & Your Role

**Objective:** To provide a foundational understanding of the National Exchange Club, its structure, and the pivotal role of the Club President.

- **1.1. Exchange Club Fundamentals:**
  - Vision: "A strong America, safe communities, and unified people."
  - Mission: "Exchange, inspiring communities to become better places to live."
  - Core Values: Family, Community, Country.
  - Motto: "Unity for Service."
  - Overview of the National Exchange Club structure: National Headquarters, Regions, Districts, Divisions, Clubs.
- **1.2. Role of the Club President:**
  - Serving as the executive officer of the club.
  - Leading the club in membership growth, program excellence, and leadership development.
  - Fostering a spirit of teamwork and creativity within the club board and among members.
  - Ensuring the efficient operation and financial health of the club.
- **1.3. Key Relationships:**
  - Collaboration with Club Officers (President-Elect, Secretary, Treasurer, Immediate Past President) and Board of Directors.
  - Interaction with District Directors and Volunteer Field Representatives (VFRs).
  - Connecting with National Headquarters staff for support and resources.

### Module 2: Club Governance and Operations

**Objective:** To understand the administrative and operational requirements for leading a successful Exchange Club.

- **2.1. Club Bylaws and Policies:**
  - Understanding and adhering to National, district, and club bylaws.
  - Key provisions related to club management and policies.
- **2.2. Effective Club Meetings:**
  - Conducting regular meetings (at least two per month, with virtual components encouraged).
  - Standard meeting agenda: Call-to-order, Invocation, Pledge of Allegiance, speaker presentation topics.
  - Importance of American flag and Exchange Club banner presence.
  - Maintaining meeting efficiency (no more than one hour, start/end on time).
  - Promoting meeting attendance.
- **2.3. Board of Directors Management:**
  - Handling club business at separate quarterly board meetings (not general club meetings).
  - Preparing and following a structured agenda for board meetings.
  - Establishing standing and special committees as necessary.
  - Monitoring committee work and progress reports to the board.
- **2.4. Records and Reports:**
  - Ensuring proper maintenance of club records by the Club Secretary.
  - Timely submission of required reports/forms to the district and National Headquarters (e.g., Officer Election Report, Project reports).

## **Module 3: Membership Growth and Retention**

**Objective:** To develop strategies for increasing club membership and ensuring member engagement.

- **3.1. Membership Goals and Recruitment:**
  - Striving to maintain a minimum membership of 25 members (15 for new clubs aiming for 25 within one year).
  - Implementing ongoing, aggressive membership recruitment programs.
  - Knowing the joining process and membership categories.
- **3.2. New Member Induction and Orientation:**
  - Ensuring all new members are properly inducted.
  - Providing comprehensive new member orientation.
  - Helping new members log on to the Exchange Club Member Website.
  - Involving new members in club projects and committees.
- **3.3. Member Retention Strategies:**

- Identifying reasons for membership loss (e.g., too many/few activities, wrong type of activities, financial problems).
- Developing proactive plans to enhance member engagement and satisfaction.
- Utilizing member exit interviews to understand loss patterns.

## **Module 4: Programs of Service & National Project**

**Objective:** To effectively implement the National Exchange Club's core programs and National Project within the community.

- **4.1. Overview of Programs of Service:**
  - Americanism.
  - Community Service.
  - Youth Programs.
- **4.2. National Project: Prevention of Child Abuse:**
  - Active involvement in child abuse prevention efforts.
  - Sponsoring projects outlined in the Prevention of Child Abuse Project Guide.
  - Supporting existing prevention agencies or establishing a local Exchange Club Prevention of Child Abuse Center.
- **4.3. Project Planning and Reporting:**
  - Encouraging clubs to plan projects in advance of important events and observances.
  - Reporting completed projects on the Exchange Club Member Website's projects tab.
  - Aiming for the National Service Award by sponsoring projects in each service category.
- **4.4. Fundraising:**
  - Raising sufficient funds to support planned service programs.
  - Maintaining high standards for all fundraising activities.
  - Ensuring funds from the community are used exclusively for service projects and liability insurance.

## **Module 5: Financial Management (Oversight)**

**Objective:** To understand the President's oversight role in the club's financial health.

- **5.1. Budgeting and Dues:**
  - Ensuring the annual club budget is prepared by the Treasurer and approved by the board.
  - Confirming dues are sufficient to meet overhead and operating costs.
  - Promoting prompt billing and collection of dues and joining fees.
- **5.2. Financial Reporting and Compliance:**

- Ensuring the Treasurer keeps complete financial records and provides reports to the board.
- Confirming annual audits of the Secretary's and Treasurer's books and records.
- Understanding the club's 501(c)4 tax-exempt status and the requirement to file Form 990 or 990-N by November 15.
- Awareness of general liability and crime insurance coverage.

## **Module 6: Communication and Public Relations**

**Objective:** To effectively communicate the club's mission and activities to members and the broader community.

- **6.1. Internal Communication:**
  - Ensuring monthly club publications are produced for member communication.
  - Focusing publications on club activities, goals, and stimulating attendance.
- **6.2. External Communication and Publicity:**
  - Developing an effective public relations program.
  - Regularly sending news releases to area media, websites, and social media.
  - Documenting events with photography for publicity.
  - Utilizing the PR/Marketing Tools available on the Exchange Club Member Website.
  - Submitting articles to "Exchange Today" magazine for outstanding news.

## **Module 7: Leadership Development & District/National Engagement**

**Objective:** To empower the Club President to develop future leaders and integrate the club into the larger Exchange network.

- **7.1. Training Other Club Officers:**
  - Working with the board to ensure other club officers are trained and supported in their roles.
  - Encouraging participation in Exchange Education courses.
- **7.2. Participation in District Activities:**
  - Encouraging club participation in district-level training conferences, conventions, and meetings.
  - Ensuring club representation at district events (e.g., District Convention quorum).
  - Collaborating with the District Director assigned to the club's division.
- **7.3. Engagement with National Programs:**
  - Promoting attendance at the National Convention and National Leadership

- Series (for eligible officers).
- Encouraging participation in National Days of Service and special observances.
- Utilizing the Exchange Club Member Website for resources, reports, and awards.
- **7.4. Awards and Recognition:**
  - Familiarity with The National Exchange Club's award program (e.g., National Service Award, Distinguished Club President).
  - Encouraging members and the club to strive for excellence and apply for awards.

## Module 8: Utilizing Technology for Efficiency

**Objective:** To leverage modern technology to enhance club operations and outreach.

- **8.1. Virtual Communication & Meetings:**
  - Embracing video and hybrid meetings for club, board, and committee meetings.
  - Utilizing social media for club promotion and member engagement.
- **8.2. Online Tools & Resources:**
  - Leveraging the Exchange Club Member Website for education, forms, and reporting.
  - Exploring payment-sharing apps for fundraisers and survey software for feedback.
  - Considering digital forms for member information and roster updates.

### Resources for Club Presidents:

- **Club Leadership Guide:** Essential for training club boards.
- **Exchange Education Courses:** Online training including "Club President Orientation" (completion by August 1 for awards).
- **Exchange Club Member Website:** Central hub for resources, forms, project reporting, and awards information.
- **District Director:** Your primary contact for guidance and support at the district level.
- **National Headquarters Staff:** Available for questions, advice, and leadership materials.
- **Volunteer Field Representatives (VFRs):** Experienced leaders who can provide direct assistance and training.

This outline provides a comprehensive framework for training Club Presidents, empowering them to lead their clubs effectively and contribute to the overarching mission of the National Exchange Club.