

***Our Voice is One
of Conviction and Strength,
the Attributes of Leaders.***

**PRESIDENT, PRESIDENT ELECT
AND VICE PRESIDENT MANUAL**



WELCOME

As a club leader, you will be called on to handle a variety of situations. Success of your club is dependent upon approaching the year expecting positive results. Take the initiative; make the right things happen.

This manual is designed to assist you in reaching the goals and expectations of your members. Remember that help is available! Sertoma Specialists, leaders and headquarters staff are always available to answer your questions and provide needed materials and information.

For Those Who Wish to Serve, There is Sertoma!



TABLE OF CONTENTS

President	3
Your Role as President	
Leadership	
Managing Club Business & Finances	
Membership	
Club Programs	
Working with National	10
Specialists	
Communications	
President Elect	12
Vice Presidents	13
General Leadership Tips	14
Additional Resources	15

PRESIDENT

YOUR ROLE AS PRESIDENT

As president, you are essentially the chief executive officer of your club, supported by a team of other club officers, directors and committee chairs. In this role, you will have many critical responsibilities that will help ensure a successful year ahead. Among those duties, you will:

- Cultivate an environment of leadership development
- Spearhead club business
- Foster current and future programs and projects
- Oversee the membership

It is important that you assume office with great enthusiasm and a desire to make this year the club's best ever. It is not unusual for a Sertoma club to experience some administrative or growth difficulties. When such situations develop, it is important for club leadership to recognize that assistance is available from your national board members and Sertoma headquarters.

For more information on what services are available or from whom, contact Sertoma headquarters at (816) 333-8300 or infosertoma@sertomahq.org.

LEADERSHIP

Before you can begin to lead others, you must spend some time developing leadership skills of your own. The strongest leaders will have an understanding of methods for:

- Delegating responsibility to other leaders and volunteers
- Effectively leading board and club meetings
- Motivating members through tactfulness, friendliness, integrity and objectivity

Your first responsibility as president is to build a strong leadership team. This is one of the most important things you will do for your club. The board of directors (your leadership team) includes the elected officers and directors. This group is responsible for the conduct and management of club affairs.

Once your board is in place, it is time to begin filling your committee appointments. The Sertoma committee structure was designed to help strengthen the club, but don't take what's always been done as gospel. Look at the committees that are in place, your activities over the next year (and beyond) and create your committees to address those

needs. You will need to identify the standing and special committees that will be in place throughout your term. Assess what is most effective for building a strong club by thinking about what each committee can achieve during the year and how they relate to your club's current goals.

The authority to appoint committee chairs and committee members is vested in you as president. Therefore, it is crucial that every committee chair be appointed promptly to ensure that the club is effectively pursuing its goals. Consider the balance of the membership and make sure that every interested member is appointed to at least one committee when possible. Your membership roster likely has a wealth of talent ready to assist you with defining and carrying out the club's mission.

In making appointments, you must keep in mind the role and responsibilities of each committee, and sell the importance of the task ahead to those candidates being considered for leadership positions. Verify that these individuals are willing and able to handle the assignment. It should be made clear to chair candidates that each committee will require a special commitment of time and effort. Advise the candidates that they are being selected because of your belief in their ability to handle the responsibility successfully and with punctuality.

Although great emphasis is placed on the appointment of the chair, do not forget the importance of committee members. Keep in mind that one of the factors that prompted membership in your club was the opportunity to repay the community by working on mission activities. The committee chair should be involved in filling committee vacancies, as they will become the team of that chair.

Remember: there are rewards, personal and otherwise, for committee achievement. Chief among them is the fact that committee success enhances greatly a member's individual pride in the organization. This is an important club growth stimulator.

Club Leadership Conference

Many presidents find it helpful to begin their term with a Club Leadership Conference just prior to the start of the fiscal year. The conference should be a thorough exploration of the club, its growth goals and the mission activities. Attendees will likely include club leaders, representatives of standing committees and perhaps even members at-large to submit recommendations on strategic goals and objectives.

There are two methods of holding a meeting: informal or formal. Many past leaders have found that a more formal presentation is better received and can offer many benefits. In planning your conference, you should:

- Select your date, time and place as early as possible. Keep in mind that an evening or weekend meeting may work best for the group.
- Invite attendees, following up with personal telephone calls as needed.

- Utilize training, informational and template resources provided in the Sertoma Member Center at **members.sertoma.org**. A sample agenda is even provided in the Resources section of this manual.

Cultivating Leadership

Sertoma offers a variety of opportunities for members to use their myriad of talents and experiences to make this an even greater organization. Club officers should always be identifying those members who have demonstrated talent in leadership. A prudent club leader will help those special members walk through the process of becoming more involved in the affairs of a club. It is important that potential leaders be given opportunities to chair committees, head special projects and even become members of the board of directors.

Among the members of our clubs are those special individuals who possess the leadership talent that can, and should, be utilized at the national or regional level. Do not hesitate to recommend talented individuals for higher office. If you know of someone with this kind of potential, contact Sertoma headquarters.

MANAGING CLUB BUSINESS & FINANCES

As president, it is critical that you ensure that the board fulfills its primary responsibilities and fiscal accountability in all matters. Before your term even begins, you should educate yourself on the governing and historical basics of your club, including:

- Rules, procedures and traditions under which the organization operates
- Club governing documents
- General club history
- Recent club achievements and current projects
- Fundraising activities

Most likely, you will serve as the presiding officer at board meetings. Board meetings are where a majority of club business will be conducted, though much of the actual work and execution will occur through committees and task forces. This is an important distinction because it will fall on you to make sure that club business does not bleed into regular club meetings. However, from time-to-time, a project of major importance or expenditure may require it to be presented at a general membership meeting.

It is important that you make sure that board meetings are called to order and adjourned on time. Work with your other officers on the meeting agenda and any supplemental materials. This agenda will help keep the meeting on track. You can find additional tips for effective board meetings in the Board of Directors Manual in the Club Leadership section of the Club Resources page at members.sertoma.org.

Finances

The board of directors must ensure that the club handles all funds in a professional and ethical manner. Since many of the day-to-day responsibilities are overseen by the treasurer, it is important that the club president understand their role and function (see the Treasurer Manual for more information).

The president must set a good example to other officers and directors by reading all financial reports and asking questions when appropriate. The board should insist that the treasurer prepare and present specific financial reports for review and approval at each regular meeting of the board.

For example, the board should carefully examine the membership dues report quarterly. This report provides current information on the status of members. In the event members are delinquent in their dues, the board of directors should act promptly and in a business-like manner. Other reports to review regularly include the cash flow report and the budget.

To assure proper handling of all monies, the board should designate the financial institutions where funds for the club (checking and savings accounts) are to be deposited and maintained. While the treasurer will open and maintain the accounts, it is important to have at least two signatories on each club account, even if the bank only requires one signature on a check. In the event that one signatory is ill, absent or fails in club duties, members will still have access to club funds and all bank records. Both signatories should receive and review copies of the bank statement each month. These are important steps to protect the club and those volunteers who take on the responsibility to help manage club funds.

Other board financial responsibilities to keep in mind:

- Approve accounts payable requests and reports as required.
- Make sure Sertoma invoices and Region fees are paid upon receipt.
- Ensure checks bear the signature of an approved signatory. Designated officers should never sign a blank check.
- When club funds are received by anyone other than the treasurer, he or she should be required to make sure funds are properly accounted for (with receipts) and turned over to the treasurer as soon as possible.
- Determine if a bond is necessary or required.

The board is also responsible for approving and following the club's budget. As you and your leadership team consider various projects and programs for the year, give special consideration to the financial needs of each project. It is important that each project be properly budgeted. The best rule of thumb is to make sure that appropriate income is available for all anticipated expenditures. Clubs with a healthy sponsorship account, or with a history of successful fundraising activities, find it much easier to embark upon a great variety of service projects.

Insurance

Insurance is an important topic that cannot escape the attention your board of directors. It is the board's duty to see that adequate insurance is secured for any activity from which liability might arise to the club and its members. Find complete insurance program details on the Club Resources page in the Sertoma Members Center.

MEMBERSHIP

It is essential that you know your membership. The growth and stability of a Sertoma club hinges a great deal on the ability of a club to maintain and hopefully grow its membership. An ongoing membership-building program is essential for every club, and you should work closely with the board and the vice president/chair of membership to ensure that an aggressive campaign is underway year-round.

As you talk about membership, remember that your current members are likely your best advocates. Members should be proud of the club. That is why it is so important to keep them informed about what is happening. Regularly discuss club and mission activities with them. Seek their input as you introduce exciting new ideas that have yet to be presented to your club.

Your leadership team should also find ways to make sure the club is desirable to new members. Remember, new members are generally looking for an opportunity to get involved. Think about how some of them may fit into your existing programs. This can enhance their comfort and help event and meeting attendance reach a new high.

In general, when working with members, remember that communication is as important as attitude. You must listen to what members are saying. After all, no matter how much we talk, there is no communication without someone who hears what is being said.

Note: Member recruiting, retention and club rebuilding materials are available in the Member Center section of the Sertoma website.

Managing Club Meetings

Your sincere, genuine attitude will be reflected in the conduct of the club meetings. Club meetings are a time for members to socialize, exchange ideas and learn. While they should not be business-focused, your club meeting agenda should include some brief time to update the club on any critical board action items. Complete details of board and committee meetings can then be included in the club newsletter.

If your meeting includes a guest speaker, make certain that the speaker is treated as an honored guest. Communicate meeting details and expectations ahead of time (e.g. how much time has been allotted for the presentation, will there be a Q&A, etc.). For maximum impact, the guest speaker should be the last item on the agenda.

Participation at Sertoma Conventions

Sertoma conventions are a valuable source of information for all members. You are responsible for securing adequate representation of the club at all conventions and should do your very best to attend the regional and national conventions during your term. You will find that these conventions not only offer an opportunity for great fellowship, but also include first-class training and the chance to exchange ideas with other club leaders from your region and across the country.

Some clubs may elect to host a regional convention. If your club decides to take on this fulfilling responsibility, here are a few things to consider:

- **Site Selection:** The date and location are determined by delegates at least one year in advance. Clubs wanting to host a future convention should submit a bid in writing to the Regional Director.
- **Raffles/Drawings:** Host and visiting clubs and their members are prohibited from selling raffle tickets, conducting drawings, etc. for the benefit of their local mission activities or any other purpose at conventions. Host clubs may, however, solicit door prizes.
- **Political Campaigns:** There shall be no solicitation of funds at any convention for the purpose of advancing the candidacy of any person for elected political office.
- **Sertoma Elections:** Literature or material soliciting support of candidates for office or promoting convention sites at any Sertoma Convention is permissible provided that materials are in good taste and of a size small enough to be placed at tables or in the hands of club delegates. Nothing may be attached or fastened in any manner to walls or other surfaces of hotels or other locations where convention activities are held. Large banners or signs may be utilized if installed by the hotel staff.
- **Club Exhibits:** Space may be provided for clubs desiring to have exhibits at the convention. Clubs are encouraged to prepare a display to show other attending Sertomans what projects and activities are being undertaken in the club's community.

CLUB PROGRAMS

Realize that success is built on success – and that means achievement. Your role as club president is two-fold – providing strong support for the current, ongoing programs and creatively developing future service opportunities. After all, you are responsible not only for this year but also for the future of the club.

The club's projects are the link to the community. Much of the community's attitude toward the club will be determined by how well the club is represented. Be sure the community knows that the club can be depended upon to provide a valuable service. Take time to offer the club's cooperation to other local organizations such as Scouts,

Big Brothers Big Sisters and other community groups. Whatever commitments the club makes, be ready to follow-up. It is important that the club be known as an organization that keeps its words.

When a new project or activity is introduced, the objective of the project and the function of the committee must be clearly defined by the board of directors. It is essential that the membership and the assigned committee fully understand the purpose and function. Do not hesitate to call upon your predecessors, including the past presidents, for guidance. They are often influential amongst members and can help gather support for new programs.

WORKING WITH NATIONAL

SPECIALISTS

Sertoma Specialists function within specific areas to ensure that the needs of each club is met. You can find more information on these roles, including a roster of who is assigned to your club, in the Members Center at sertoma.org.

Communication Specialists

What's working? What's not? How do I get help? Communication Specialists will help your club answer these questions and bring value and strength to your relationship with national through timely and accurate communication.

By grouping clubs across the country based on similarities other than geography, members can connect with new perspectives and ideas. The Communication Specialist facilitates this exchange to help re-energize members and identify the resources they need to succeed.

Mission Specialists

As a Sertoman, your mission efforts impact the individuals, families, and communities your club serves. Our Mission Specialists help bring Sertoma's national hearing health mission to the local level through programs and giving to the Annual Fund. As members and clubs find new and exciting ways to take part in these mission efforts, we are able to expand our impact on those with hearing health needs nationwide.

Training Specialists

Training Specialists help strengthen the skills of your members so that your club can generate better outcomes in your community. Specialists can provide training through on-demand videos, by request (face-to-face or through technology), or at conventions.

COMMUNICATIONS

Information is sent to the president, secretary and treasurer by Sertoma headquarters. This includes the monthly *Sertoma Insider* e-newsletter. Share news from these communication pieces at board meetings with other club leaders as well as the general membership.

Sertoman and Sertoman Digest: Every Sertoman receives these publications as part of the services provided by Sertoma headquarters. If your club has a unique news story

that you would like to share in *The Sertoman* or *Sertoma Digest*, send the article (or any info) and photos to the editor of *The Sertoman*.

Sertoma News: This monthly email news bulletin provides useful information on various national deadlines and programs. Headquarters also publishes the Hearing Charities of America newsletter to keep members and donors informed about the Hearing Aid Project and other HCOA programs and news.

Online Resources: Sertoma's website, sertoma.org, is your up-to-date resource on many topics. Make sure to check out the Club Resources section of the Member Center in particular. This informational hub has links to forms, training videos, resource manuals and more. The private Sertoma Members' Corner is also a great place to connect with other members, ask questions and find out the latest updates from Sertoma Headquarters.

CLUB PRESIDENT ELECT

Some clubs select the president elect at the club's annual election in April, about 14 months prior to assuming the office of president on July 1 of the following year. This gives you a full year to prepare for the assignment ahead. Your responsibilities are varied, but your primary function is to plan, prepare and get organized for a year of special leadership. Primary on the agenda is to learn as much as possible about your club and Sertoma.

The knowledge gained as president elect will provide a great base for your term as club president. This begins with being an active member of the board of directors. As the next leader of the club, it is critical that you understand current club structure, functions, programs, fundraisers and membership.

During your term, you will also be a special assistant and counselor to the incumbent president. In so doing, you may carry out assignments delegated to you by the president and/or board of directors. You will preside at meetings in the absence of the president, thus preparing for the day when you become club president. In this respect, you must become familiar with the planning process. Getting comfortable as a presiding officer takes some effort and time.

As an effective presiding officer, you should follow a well-planned, timed agenda. It is important that you become familiar with parliamentary procedure. In some instances, you may be invited by the president to serve as liaison to a club committee. It is of particular importance that you make every effort to attend conventions and other events where you will have an opportunity to learn more about the organization from other leaders.

During your term, take time to get to know your club's membership. It will soon be your responsibility to make committee assignments, and new leaders should have a chance to emerge in their own right. In identifying potential leaders for the next year, you will want to exercise caution by not implementing your action plan too early. The process must be well managed by the incoming president to assure a smooth transition and to keep the club moving in a positive direction.

CLUB VICE PRESIDENT

The number, role and responsibilities of the vice president(s) vary among clubs. In some cases, this is dictated by the governing documents, while other clubs give the president authority to determine the role of the positions annually. This assures a sequence of leadership experience for those who, in most cases, will become president. These roles usually provide that each vice president serve as chair to one of the club's major committees such as membership, programs and mission activities.

Needless to say, an effective club has an ongoing membership program; a wide variety of mission activities; and informative, entertaining meetings. These are three vital ingredients for a successful club. As a vice president, you must be very diligent in handling assignments. These committees are the "heart and soul" of the club.

- **Membership:** Work with the president to develop and implement an effective membership development plan, including retention, recruitment, engagement and orientation. This position is responsible for monitoring and reporting the progress of the club's growth plan.
- **Mission Activities:** Ensure that the club has a healthy slate of mission activities and that all members aware of programs. Become familiar with Sertoma's national mission activities.
- **Programs:** Emphasize the importance of having guest speakers at club meetings. Ensure that guest speakers are greeted and made to feel comfortable. Give priority to the introduction of the guest speaker, and at the close of the presentation, express the club's appreciation. Invite all members, especially new members, to assist in developing the programs for the year.

As the president's assistants, vice presidents may be called on to counsel the club leader in the spirit of teamwork. It is important that you understand the operation and responsibilities of the board of directors. It is recommended that you learn the general duties of each club office, as well as the workings of the various club committees. A dedicated vice president will serve as the president's sounding board, listening to the latter's ideas and plans and advising when appropriate and possible.

GENERAL LEADERSHIP TIPS

- Attend conventions to ensure that the club has solid representation at the regional and national levels.
- Keep notes on ideas and things to do. A good checklist will be most beneficial to you as a leader.
- Establish a time schedule for completion of each item on your agenda.
- Visit neighboring clubs. See how they operate. Everyone has a different style. Good ideas can be adopted and poor practices avoided.
- The transition meeting is crucial. Before the new year arrives, the current and new boards should get together. Notes, materials and tips should be passed on to the new team. A similar meeting for committee chairs is highly beneficial.
- Establish specific goals and commit them to paper. Many club goals focus on serving the community. Fellowship and self-improvement for members are also important.
- Learn parliamentary procedure. Be familiar with the basics of conducting meetings. There are many easy references available online that require minimum review.
- Sertoma provides you with a wealth of materials through the Member Center section of the Sertoma website. Familiarize yourself with the wealth of information and tools found there.

RESOURCES

President's Sample Calendar	
Year-Round Reminders	Notes
Prepare president's message for every club bulletin.	
Schedule board of directors meetings.	
Use a written agenda for each club and board meeting.	
Schedule quarterly orientation for new members.	
Send a story and photo to the Sertoman magazine on a unique club project.	
Incentives are the "payback." Make sure the members are properly recognized.	
Make sure to have a speaker for every club meeting, regardless of the number of members in attendance.	
Schedule a new member induction when a new member joins the club.	
Before Your Year Begins	
Be sure goals are committed to paper.	
Plan CLC: This is the most important meeting of the year.	
Appoint committee chairs and assign members to committees.	
Consider a New Club Building project.	
Review current club roster with incumbent club secretary.	
Finalize plans for club officer installations in July.	
Officers elect and incumbents should conduct a transition meeting in late June.	
Review sponsorship and fundraising plans the first quarter.	
A budget is important. Monitor yours carefully.	
July	
Conduct club officer installation.	
Are you working with an approved budget?	

Call for an audit of last year's books	
Schedule an Annual Fund presentation.	
Submit Sertoman of the Year and Service to Mankind entries to Director by July 1.	
August/September/ October	
Have awards committee chair review and present individual awards guidelines.	
November/December	
Review club goals for the year.	
Conduct quarterly New Member Orientation.	
Are club finances in proper perspective?	
Review club goals for the year.	
January	
Promote support to the Annual Fund.	
February	
Appoint a nominating committee to select candidates for club office for the next fiscal year.	
Plan and discuss attendance at Convention.	
March	
Prepare for officer elections.	
April	
Observe Sertoma's Anniversary – April 11, 1912 is the founding date. Celebrate by bringing in a new member!	
Prepare for Better Hearing & Speech Month programs in May.	
If your club has not yet elected its officers for next year, be sure it is done right away.	
Appoint Service to Mankind and Sertoman of the Year nominating committee.	
May	
May is Better Hearing & Speech Month.	
Plan a transition meeting with next year's club officers.	
President elect begins the transition process in collaboration with retiring president.	

Present Service to Mankind and Sertoman of the Year committee report to club.	
June	
Year-end progress/review meeting with the board of directors.	
Think now about how your club will expend its energies on mission activities this summer.	
Current officers and officers elect should hold a transition meeting this month.	
Submit Service top Mankind and Sertoman of the Year entries to Director by July 1	

President Elect's Sample Calendar	
May/June	Notes
Attend Region and National Conventions.	
Get acquainted with all club members.	
Participate and assist with the Club Leadership Conference hosted by your president.	
July	
Study your club's history. Get acquainted with its traditions.	
August	
Learn as much as possible about how the club functions.	
September	
Research club's mission activities.	
October/November/December	
Learn as much as you can about the organization.	
The governing documents are important reading materials.	
Visit with the current treasurer and ask questions.	
January/February	
Commit your ideas to paper.	
March/April	
Study the committee structure.	
Identify your priorities.	
Learn about your members.	
Appoint the committees.	
May/June	
Plan and schedule your Club Leadership Conference.	
July	
Attend the Annual Sertoma Convention.	



CLUB LEADERSHIP CONFERENCE AGENDA

Meeting Location

Date & Time

1. Call to Order
2. Invocation
3. Pledge of Allegiance
4. President's Welcome & Special Introductions
5. Introductions – Have each club officer introduce themselves.
6. Club Administration
 - a. President's Calendar
 - b. Officers & Directors
 - c. Committees
 - d. Goal Setting
 - e. Club Manual
7. Membership Recruitment & Retention
 - a. Philosophy of Growth
 - b. Membership Development & Retention
 - c. Attendance
8. Finances & Reporting
 - a. Budget
 - b. Fiscal Responsibility
 - c. Dues – Club, Region and National
 - d. Record Keeping & Reporting
 - e. Fundraising
9. The Annual Fund – Supporting the Programs of Sertoma
10. Sponsorships
 - a. Local
 - b. National
11. Incentives & Recognition
 - a. New Awards
 - b. Individual Awards
 - c. Club Awards
12. Sertoma & Its Divisions
13. Q & A
14. Adjournment