



**Club President's
Management Guide**

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TRAITS & CHARACTERISTICS OF AN EFFECTIVE PRESIDENT

As club president, you are not only the presiding officer but also counselor, motivator, and team leader of Quota's most important unit - the local club. Your election to this office indicates that your members agree you have the essential ingredients of a good leader. Such traits and characteristics include:

- *Good communications skills.* It helps to be comfortable in communicating with the entire club, committee groups, club members, and individuals outside the organization. Keep watch on non-verbal communications. Members who squirm in their chairs, nervously tap their fingers, or suddenly become silent may be opposed to the discussion. Provide them with an opportunity to voice their displeasure before you move to another topic.
- *Willingness to listen.* You can't do it all yourself. Work with fellow officers and your board of directors to develop and establish policies and plans for action. Furthermore, the best groups are led by people who are open-minded and encourage free expression of opinions and recommendations by all group members, including those who are vocal about what they want and those whose participation must be encouraged.
- *Ability to facilitate.* Above and beyond the skill of listening is the ability to understand group dynamics and to facilitate the work of the club rather than to drive it to completion. Don't hold court during the meeting. Guide your members by mediating, probing, and stimulating the group, allowing others to thrash out the ideas while you keep the group focused on the central question and moving toward a decision. So vital is this skill to the presidency that you will find a special section on the role of facilitator on page 4.
- *A flair for innovative administrative practices.* Traditional management techniques based on organizing, planning, delegating, and controlling the work of others are often ineffective in a democratic group of volunteers. First of all, it is better to get the majority to buy in on the overall goals of the club as well as the steps the group must take to meet those aims. Even industrial and commercial CEO's in various parts of the world are beginning to see the advantages of team effort, and various forms of total quality management programs are being introduced everywhere with dramatic results. The president who is familiar with such techniques should suggest their application on an experimental basis. Once the group agrees upon its major objectives, the president's role is to establish a cooperative working relationship among committee groups or teams appointed to reach these goals. To help move along the discussion and work of others in an orderly fashion, it helps to be familiar with the specific duties and deadlines of others, to know the basic rules of parliamentary procedure, and to know where to look up club bylaws should they become a factor. In other words, be totally prepared. Where your own responsibilities are concerned, you still need to be a self-starter. For more details on time management, see page 6.
- *Presidential poise.* The abilities to command attention, inspire others, and control without domination are essentials of good leadership. An effective president understands the power relationships within the group and refuses to be swayed by them. While presiding, keep the group focused on the central question and moving toward a decision. Although consensus is required, obtaining unanimity is not. Compromises necessary to elicit a unanimous vote often diminish the value of a good idea. Once you are elected, it is up to you to establish

yourself as the leader of the club. Don't look to past club officers for approval or affirmation of your role. Authority is something you take hold of after you are elected. No one hands it to you.

- *All-out participation.* To enjoy the full benefits of their Quota membership, members need to feel they are a vital part of their club and community. That experience will not be a valid one unless you, as the president, keep all lines of communication open. When unable to attend personally, appoint a club representative to go to meetings of other civic groups. Make sure representatives bring back full reports from meetings, and disseminate information gleaned through print or correspondence.
If members miss your club sessions, encourage them to attend make-up meetings at other Quota clubs, if there are others nearby. See that those who travel check the international directory, or Quota website to connect with and visit clubs in other cities and countries. Take advantage of all invitations to participate in local civic and community programs.
- *Encourage a clash of ideas not personalities.* When emotions run too high on the floor, call on a neutral member who is not involved in the exchange. You do need to deal with disruptive members who constantly seek recognition by dominating or clowning during sessions, but it is preferable to do it privately, discreetly, and in a caring manner. Point out the effects of the behavior and suggest less disruptive ways of getting attention.
As far as mentors are concerned, it's better to look for them outside the club. Compare notes with other Quota presidents. It helps to hear how others have solved problems or eased political tensions. Outside mentors will not be able to settle your local club disputes. These must be resolved within the group. Yet, you will find that discussing sensitive situations with those who are not directly involved will help you be fair, more objective, and less inclined to be intimidated or overwhelmed by the aggressive faction. For specific guidelines in working with difficult personalities, see the "Resolving Conflict" section on page 7.
- *Summarize your meetings.* At the close of each business session, summarize the achievements and the progress made, giving your group a sense of accomplishment.
- *Make it fun.* Good leaders throw everything they've got into the job. Extraordinary ones use humor and an atmosphere of camaraderie to arouse the same zeal in individual members, multiplying both efforts and results. This also will reduce stress within yourself and among your members.
- *Proficiency.* You may not feel that you possess all of the traits and characteristics outlined in this section, but you'll be amazed at how many you will develop if you read the written materials available on Quota's website during your term. They will prepare you for new heights within and outside Quota.

Some of these qualities were outlined in an article in the January 1993 issue of *Association Management* by John E. Schlegel, CAE, a Maryland consultant and former association executive.

BUILDING TEAMS

To achieve maximum efficiency and high club member satisfaction, a Quota club president builds a team that strives for effectiveness and productivity through deliberate, systematic efforts. Such a team does not grow haphazardly nor is its success automatic.

Dimensions of Team Success

Team success or maturity involves growth in the following dimensions:

- *Involvement.* A high performance team has a sense of ownership of its tasks and leadership is shared by all.
- *Responsibility.* Members assume greater responsibility for their own behavior and the impact of that behavior on both the task and their relationship to others.
- *Trust and caring.* In a productive team, trust and caring among members allows them the freedom to express concerns, feelings, fears, and ideas without hesitation or repercussion.
- *Use of resources.* Diverse resources are sought out, accepted, and utilized. Creativity and innovation are promoted; new ways of thinking and original ideas are fostered.
- *Listening.* Listening is active. Communication is honest and genuine; self-disclosure is encouraged; confrontation on issues is encouraged; and respect is conveyed by the way members relate to one another.
- *Self examination.* An effective team examines its operation with a rational and objective eye. The members observe where the interaction is productive and where it may be restrictive and defeating.
- *Experimentation.* The team explores and invests in calculated risks to advance the mission of Quota.
- *Accepting new members.* The effective team is able to incorporate new members and to comfortably invite them to use their resources.
- *Hidden agendas.* An effective team has learned to acknowledge that individuals may from time to time bring a hidden agenda to the group that they hesitate to openly share. The team has learned to allow the hidden agenda to surface in open discussion so that personal needs may be handled without disturbing the team.

Conditions for an Effective Team

The following conditions are necessary for building an effective club team:

1. Team members espouse a vision or a set of worthy values by which they are identified.
2. The team works the organization's structure to encourage member participation by emphasizing flexibility, creativity, productivity, and autonomy.
3. Rewards for participation are in place to ensure full participation by all members.
4. There are opportunities for ongoing involvement in the team process so that full participation remains the norm.
5. The team recognizes and supports every member's need to balance club responsibilities with family and personal life.

FACILITATING GROUPS

As president of your local Quota club, you have many opportunities to facilitate good group process. It is your responsibility to create a positive climate for healthy discussion. The climate of the group is composed of the feelings and communication between members. The facilitator drives the process by creating the best climate for effective group work.

Desirable Club Climate

Following are factors in creating a desirable climate for your club:

- *Permissiveness.* Group members feel free to express their personal feelings. There should be no artificial rules or inhibitions that prevent members from saying exactly what they feel or think about an issue. Members must know and trust that they can say what they think and, in turn, other group members may speak their minds as well.
- *Participation.* Everyone freely shares her or his ideas about an issue and feels comfortable responding to what others have said. There is freedom to ask questions that come to mind and everyone is expected to participate.
- *Cohesiveness.* Because a group is composed of people who represent many diverse experiences and skills, there's a welding process necessary before the group can become a unit. Several factors that make a group cohesive include personal liking for individuals in the group, involvement with a group, previous acquaintance with group members, equality of status, and receptiveness by other members.
- *Flexibility.* To achieve flexibility, a group must evaluate its process frequently to ensure that it's working constructively. The procedure changes when the group needs more effective ways of operating.
- *Motivation.* The objectives of the group must be closely related to the interests and personal agendas or desires of the members of the group. This personal interest creates pressure to attain the objective of the discussion. Aids to motivation include encouraging members to express their personal desires in relation to the topic and ensuring that as many of the personal goals of each member are covered by the general and specific objectives of the group.
- *Progress.* The group must feel the exhilaration of moving in a positive direction or achieving something significant. Whenever possible, call attention to the growth that has taken place as a group and on an individual level. The growth of a group is dependent upon the nature of the group's targets.

Successful Facilitation

Following are some essential practices for successful facilitation:

- *Interact with the group.* Your role as facilitator is to encourage healthy and challenging interaction among all group members. When a group member is speaking, direct the attention of the group to that individual. Look at other members of the group so the speaker will also.
- *Press for clarity and concreteness.* Encourage members to be more concrete and clear by picking up on words or phrases and asking them to fully explain. When asking a member to

explain an experience, ask what happened to her or him. When asking for clarification of a behavior, ask what the individual did or didn't do.

- *Deal with questions.* When asked questions regarding the topic matter, refer back to the group. When the question asked is personal, move the question to another member of the group for response. When you are facilitating, you are never a member of the group at that time. Restate your role as facilitator to clarify your action.
- *Seek better understanding and response.* As facilitator, one of your responsibilities is to ensure that there is clarity of understanding among group members. Do not accept another's perceptions or ideas as your own until they make sense to you. Clarify the speaker's meaning.
- *Speak to the subject.* When you choose to participate as an individual in the discussion, be sure to preface your remarks with a statement clearly showing that these are your views, not those of the facilitator. Confront any comments that may be construed as defensive, disapproving, condescending, sarcastic. Personal cross-examination, self-approval, or conversion of personal views to a position on the topic at hand
- *Deal with disruptions.* It is your responsibility to eliminate disruptions. You must confront the behavior, which means you must invite the person creating the disruption to deal with you on her or his behavior. It is the responsibility of the facilitator to ensure a positive and constructive experience for the entire group. No single individual in the group is ever greater than the whole group. You cannot sacrifice the experience of all for the personal agendas of one.

TIME MANAGEMENT PRINCIPLES

As president of a Quota club, your time is precious to you and to the people you serve. Making the most out of this precious commodity is essential. Time management is simply taking control of your life, producing and experiencing every day as you choose. You make the choice to act. Following are principles designed to help you manage your time to your and Quota's advantage:

- *Planning.* The great majority of problems in club management arise when action occurs without thought. By failing to plan, you risk planning to fail.
- *Priority.* Available time is budgeted or allocated to tasks in ordered sequence of priority.
- *Objectives.* More effective results are achieved through purposeful pursuit of planned objectives than by chance.
- *Daily planning.* Daily planning, formulated the afternoon before or early the same day, in harmony with near-term objectives and events, is essential to effective utilization of time.
- *Tyranny of the urgent.* Many people are tyrannized by the urgent and respond unwittingly to the endless pressures of the moment, neglecting the long-term consequences of more important but less demanding tasks left undone. Don't fall into this trap.
- *Effectiveness.* Efficiency means doing the job right. Effectiveness means doing the right job right. Effective action produces maximum results with minimum expenditure of resources, including time.
- *Delegation.* Authority for decision making is delegated to the lowest possible level, consistent with adequate judgment and available facts.
- *Procrastination.* Deferring, postponing, or putting off decisions or actions can become a habit that loses time, causes lost opportunities and generates crises. Procrastination is the most expensive deterrent to effective management of time.
- *Concentration.* Effective Quota leaders concentrate their efforts on the "critical few" events that produce major results for the club.
- *Activity vs. results.* Some Quota presidents tend to lose sight of objectives or intended results and concentrate their efforts on activity. They are run by their job instead of doing their job. They confuse motion with accomplishment and activity with results.
- *Routine/detail.* Routine tasks of low value to overall objectives are minimized, consolidated, delegated, or eliminated to the best extent possible.
- *Interruption control.* Arrangement of and control over activities is designed to minimize the number, impact and duration of interruptions.

This segment on time management is included in this manual to assist you, as the president, in recognizing how valuable your time is to both Quota and to yourself. Your time is your richest contribution to Quota; spend it wisely.

RESOLVING CONFLICT

When you, as president, or members of your club are confronted with an issue or situation that evokes an emotional response, you are in conflict. Conflict is inevitable and even valuable in the human experience.

There are two types of conflict that you will experience in Quota--one of perception and one of values. A conflict of perception happens when someone perceives or sees something differently than someone else. A conflict of values occurs when a person's belief system is challenged--when what she or he believes to be "truth" is brought into question.

Phases of Conflict Resolution

Following are the three stages of conflict resolution that you should use in your club:

1. *Understand yourself and others.* This phase requires the ability to become genuinely aware of your own needs as well as the needs of others. First, you must accept your own feelings. Next, everyone must concede the feelings of others. Everyone must own her or his own feelings. This will help reduce hostility. This means "inviting" yourself and the group and/or club to deal with the strong feelings. When you recognize the emotion, you can come to accept the pain that it has caused.
2. *Leveling.* Leveling involves telling the truth about your feelings to yourself and others, owning these feelings, and then knowing when and how to let go of them. Leveling tells you when to release. Never try to determine when others should release their feelings. This is a critical exercise for all to learn and master. Leveling contains three components: knowing precisely how you feel; owning how you feel; and inviting yourself or another to let go of the feeling. The third step can only be achieved when the first two have been completed.
3. *Setting conditions for permanent solutions.* The communication at this stage signals that negative emotions have been removed and that a level of rapport now exists. It's important that the atmosphere remain open, honest, and flexible. It is a process of risk-taking. You gain control when you become a moving, growing, self-correcting person and/or group. Together you and the person(s) with whom you are in conflict set the conditions that satisfactorily resolve the situation. Remember, your emotions are in control and there must be an open, honest ownership and release.

These steps work, but you must be realistic regarding the length and depth of this process. Very few people confront, deal, and successfully remove feelings of conflict from their lives. This section of the *Quota Club President's Management Guide* makes it appear easy, when in reality the application of this process is quite difficult. As president, do everything within your power to establish a club environment in which conflict has an opportunity for productive resolution.

FUNDAMENTALS OF A GOOD ORGANIZATION

In cooperation with your club's board of directors, you, as president, have a moral responsibility to make sure the club operates ethically and according to a sound system of values and principles and purposely according to a well defined plan.

Integrity and Principles of the Local Club

One of your most important jobs as president is to see that your club:

- *Remains above reproach.* It is taken for granted that any organization that collects public monies on behalf of worthwhile community service projects is meticulously honest about finances. The same type of integrity should be reflected in the intra- and interpersonal relationships of Quota members, particularly among officers.
- *Lives the Collect.* At practically every meeting, Quotarians pledge to follow the principles outlined in the Quota Collect and in the formal objects defined in the club bylaws. Unselfishness, true friendship, an intelligent and compassionate approach to service, and real sharing has undergirded Quota since its inception in 1919. The Collect is still the formula for success. Remind members of it. Make it a way of life as you administer the club, project the Quota image in your community through service and involvement in civic affairs, and share ideas with other Quotarians.
- *Upholds the official Quota Objects.* To promote high ethical standards was one of the formal objects set forth in Article II of the former *Quota International Charter; Bylaws, and Rules of procedure.* Others challenge Quotarians to serve country and community; to emphasize the dignity of all useful occupations; to develop good fellowship and friendship; and to advance the ideals of righteousness, justice, and international understanding and goodwill.

A Good Foundation

Right after election, the new president generally reviews the routine operations that must be continued and the program changes that will stamp a personal imprint on the new term. What is frequently neglected is an analysis of the club's general structure, its environment, the new opportunities it offers to members, and member involvement in the *Leaders as Listeners* strategic program designed to revitalize the entire organization and the local club. Following are the fundamentals of a good club foundation:

- *High visibility.* Ask Quota's oldest and most faithful members what the organization needs most. Nine times out of 10, the answer is "Publicity...public awareness". Quota needs to be better known. To achieve these goals, the club needs better visibility within its own geographic area. Consider the local population and plan a proportionate club. A group of 20 members will not have as great an impact on a large town as a group of 50 or more, no matter how successful its service projects. A club of less than 15 in any community puts undue financial and physical burdens on individual members. Fifteen is the minimum number required to charter a new club, which is then expected to begin growing on its own. No established club should ever fall below that number. When it does, recruitment must be the immediate priority.

- *Inclusiveness.* For better representation, the club needs people from a wide variety of backgrounds. Theoretically, a member brings her or his individual talents and perhaps the backing of her or his business, institution, professional office, and governmental agency to Quota. The more community segments represented by individual members, the wider the community influence and the more likely the club is to attract people from the remaining segments of the community.
- *Live membership.* Strive for a "live" membership. Determine what percentage of your members are active, the percentage of dropouts and turnovers, and why some members drop out. Then set an optimum membership size and work toward reaching that goal.
- *Simpler, workable bylaws.* Your club bylaws should be locally oriented and should be reviewed and updated periodically.
- *Adequate financing.* Should your club opt for a combination of low dues and money making projects, or are all-inclusive, higher dues preferable? Make sure members understand from the day they join exactly how much they are expected to pay.
- *Working committees.* Flexibility in types and duties of committees is desirable to meet your club's changing needs. Coordination of committee activities will prevent overlapping and duplication of effort. Committee procedures should be reviewed and evaluated periodically.
- *Proper elections.* Good nomination and election procedures are essential. Contests in elections are desirable to give your membership a choice of leaders. The procedure for filling vacancies must be clearly defined in your club bylaws. A vigorous club has a steady stream of newer members vying for the various positions, none of which are considered so clerical that they are reserved for "non-leader" types. Officers should not be recycled.
- *Stimulating business meetings.* Well-run meetings begin and end on time and have an organized agenda that includes concise minutes; a brief, understandable treasurer's report; interesting committee reports that include accomplishments as well as recommendations for future action; and provocative discussion of new business.
- *Membership participation.* Involve all members, particularly new ones, in a variety of club activities. Determine if hands-on service is important and provide that opportunity for those who want it. Members do not develop loyalty and pride in an organization unless they feel they are making a tangible contribution.
- *Evaluation.* If your club structure is solid and follows all the requirements in the bylaws, members will be successful in all endeavors. Therefore, the president and the board of directors should consider the overall welfare of the group as their overriding responsibility. Having the best service project in town is not the hallmark of a good club if it attracts contributions but few members. Officers are espousing a cause rather than a club if they are not providing an atmosphere that is also conducive to friendship and personal development.

EVALUATING THE LOCAL CLUB

One way to maintain the vitality and effectiveness of your club is to conduct a thorough evaluation each year. The following questions are provided to guide your club's evaluation. Ask each member to provide written responses to these questions and then discuss them as a group. This discussion will help you measure your club's effectiveness.

1. Is your club meeting the needs of its members?
2. What are your club's current strengths?
3. What are your club's current weaknesses?
4. What changes would you recommend regarding your club's functions and activities? Why?
5. What are some of the deficiencies of your club?
6. List the reasons for retaining the present programs or services your club provides.
7. What benefits are your members realizing through participation in your club's programs?
8. What growth (if any) took place in club members?
9. Clearly state the value of your club's programs and services.
10. Are there better ways to meet members' needs than through the present programs or services?
What are these?
11. Are your club's goals and objectives clearly defined? If so, please list them.
12. Are there any gaps in the goals and objectives?
13. Are there any overlaps in the goals and objectives of the programs and services your club provides?
14. Is Quota's mission being achieved through your club's goals, objectives, and strategies?
15. Are member conflicts being resolved, so that they don't disrupt the attainment of your club's goals and objectives?
16. Other comments?

PLANNING

Planning, in the best sense, is used to focus on the resources and talents needed to meet the goals of your club in such a way as to permit continuous checking of the need for each step, and to allow re-planning to meet each new situation. Planning is the mechanism that helps convert the "now" situation into what you, as president, want to have in a "then" situation.

As you are aware, Quota, as a former international organization, has produced a strategic, *Leaders as Listeners* program. This program was created so leaders could learn what was most important to Quota's membership as a whole and translate our most important needs into action.

Leaders as Listeners Process

Through the *Leaders as Listeners* process, you can help your club clarify its identity and then set desired community service goals, objectives, and strategies that will be followed to achieve the desired goals.

Goal-Setting

1. What needs to be done.
2. How it should be done.
3. When it should be done.
4. What constitutes satisfactory performance.
5. How much progress is being achieved.
6. When and how to take corrective action, if necessary.

Goal-setting Terms

The key terms in goal setting are:

Goal--clearly defined, constructive statement of a desired direction of activity in broad, general terms.

Objective--A specific, time-oriented and realistic statement of what the leadership is going to do, for "whom" they will do it, and "how much" they intend to do.

Strategy--Two or more steps or specific actions to attain the objective.

Rules for Goal Setting

In order to achieve the goals you set, they must be:

Consistent and balanced. The goals you set must be consistent with each other and with the overall picture of the environment you wish to create.

Constructive. It is not desirable to have short-, mid-, and long-range goals in each area. Rather, the overall listing of goals should be high enough to be exciting and stimulating--to draw you forward like a powerful magnet.

Clear in definition. Write down each goal, with a clear description of the change you intend to make.

Characteristics of a Worthwhile Goal

A goal should reflect the following characteristics:

- It is a guide to action.
- It is general in direction.
- It is challenging and inspiring, but achievable.
- It calls for investment and involvement.
- It provides a long-range target.
- It reflects the consensus of your members' wishes.
- It can be attained through a series of objectives and strategies.

Characteristics of a Meaningful Objective

- It begins with the word "to" and is followed by an action verb.
- It produces a single key result.
- It specifies for or with whom an action is done.
- It has a target date for accomplishment.
- It is quantifiable and measurable.
- It is clear and understandable.
- It is realistic and attainable.
- It is in line with one or more goals.
- It specifies maximum cost factors in terms of time, money, and human resources.

Characteristics of a Strategy

- It names the individual or group responsible.
- It concretely states what they are to do.
- It states how much is to be done.
- It states to whom or for whom it is to be done.
- It states when it is to be done.
- It is a subdivision of a specific objective.
- It ties in sequentially or in parallel with other strategies toward the attainment of the objective.

Without the statement of goals and objectives and clear strategies, the club functions in chaos and becomes static and immobile. As president, you are the designated leader who is expected to move the club in a forward, challenging, rewarding direction. This goal-setting process sets your course, charts the club plan, and determines the role of those participating. The resulting movement directly affects your own personal satisfaction and that of your members who invest and participate in the achievement of these goals during your term of office.

Planning Your Program Meetings

Quota is dedicated to being an exceptional service organization. If Quota expects to keep its fine members and gain new ones, it must have something special to offer. You must fully understand your responsibility in creating a meeting atmosphere that is something special.

Announce a two-hour planning meeting and require all members to attend and to bring a list of new agenda items they would like to discuss. Let the membership know that you are expecting at least three agenda items from each person. At the agenda meeting, ask all members to turn in their agendas. If they do not have them, ask them to use the next 20 minutes to think about and write down their agenda items and turn them in. Review the suggested agendas and schedule them for discussion at program meetings in the coming year. If research needs to be done on a topic that is scheduled for discussion, assign a member to have it completed before the scheduled meeting.

Completing this process for planning meeting agendas strengthens your role as president. It puts the ownership of meeting agendas where it belongs, with the membership, and allows members to share in the responsibility of creating successful meetings.

DUTIES OF OFFICERS

The President:

- Takes office automatically from the president-elect position without an election. Moving from vice president to president requires a club vote.
- Asks for board approval of new programs and policies.
- Reviews the *Quota Club President's Management Guide*.
- Coordinates with predecessor and board about unfinished responsibilities.
- Presides at all meetings and acts as chair of the board of directors.
- Appoints all committee chairs--standing and special--unless otherwise provided in the bylaws.
- Appoints a club representative to civic groups.
- Consults with the board on appointment of committee members; ratifies appointments by the board of directors if necessary.
- Is an ex-officio member of all committees except the nominating committee.
- Makes parliamentary decisions and rulings even if there is an official parliamentarian to consult.
- Votes only to make or break a tie in voice or roll call vote.
- Votes as any other member in a ballot vote and cannot break a tie in a ballot vote.
- Leaves the chair to debate--never debates from the chair. A president must be firm, competent, tactful, just, neutral in the chair on controversial matters, and patient enough to allow full discussion on all debatable motions.
- Appoints service committees equivalent.
- Becomes familiar with the tools of office.
- Exercises general supervision of all club activities.
- Consults club program chairs and/or special committee chairs when planning special events.
- Handles emergencies as they arise, consulting with the board if time permits.
- Recognizes members and committee groups for work well done and not as a matter of formality when a task has *not* been accomplished.

The President-elect or Vice President:

- Presides in the absence of the president.
- Assists and advises the president in the performance of duties when called upon.
- Serves as a member of the board of directors.
- Performs the duties of the president in her or his absence or inability to serve; becomes president upon the death or resignation of the president unless otherwise provided in the local club bylaws.
- Oversees new club organization in neighboring communities, appointing organization teams when she or he is not personally involved.

The Secretary:

- Reviews the *Quota Club Secretary's Manual* upon election to office.
- Coordinates with predecessor about unfinished responsibilities.
- Keeps accurate and concise minutes of all business transacted at board or club meetings and distributes them at subsequent meetings.
- Assists the president in preparing meeting agendas.
- Prepares, under the supervision of the president, reports to headquarters.
- Answers letters as requested by the president or board of directors.
- Keeps files of all important and pertinent correspondence.

Some clubs have two secretaries--recording and corresponding. Local club bylaws must be amended to make such a provision.

Minutes should be kept in a permanent book and should state the type of meeting, name of the organization, date, place, and name of the presiding officer. They should include only business and motions made, passed, or lost. They should not include discussion.

The Treasurer:

- Reviews the *Quota Club Treasurers' Manual* upon election to office.
- Coordinates with predecessor about unfinished responsibilities.
- Is custodian of all club funds unless otherwise provided in the bylaws.
- Collects dues and submits notices to members at the appropriate times.
- Receives and disburses all funds by check as authorized.
- Keeps records of all financial transactions.
- Reports financial standing as required by the board and/or membership.
- Issues membership cards.
- Keeps an accurate list of members in good standing.
- Gives an itemized, written annual report of receipts and disbursements.
- Attends to annual tax reports--local, state, provincial or national, if they apply.

Some clubs have an assistant treasurer who is preparing to assume the job of treasurer in the future. Local club bylaws must be amended to provide for this position.

The Board of Directors:

- Meets before each club business session and at such other times as deemed necessary Board minutes are not read at regular club meetings.
- Has general supervision of club affairs between business meetings.
- Makes recommendations to the membership for actions.
- Assists in selection of committee members.
- Provides for the annual audit of the books and records of the treasurer

The board of directors is made up of club officers and directors. At least four directors serve annually, two of whom may be elected for a two-year period. (There are always two experienced and two new members serving.) Election of board members must be covered in the club bylaws.

Committees:

Membership committee. Each club should have an ongoing membership committee that is involved in regular recruitment. The committee's day-to-day responsibilities should include checking the newspaper for announcements of promotions and new professionals and business people in town, as well as soliciting and following up on the recommendations of club members. The committee also should sponsor special functions such as the club's annual membership party, or a special recruitment program called because of a sudden loss in membership.

Challenge the committee to establish a reasonable membership size for your club based on the population of the community and have subsequent committees strive for a specific increment each year until the ideal size is reached. Dispel such myths as "Quotarians work best in small groups" and "24 is an ideal membership number."

Prepare committee members for negative responses from most prospects. Point out that there is usually built-in resistance and that an effective recruiter is prepared to continue "selling" Quota membership until potential members hear something that makes them want to join.

Other committees. Additional committees should be named as necessary for the operation of your club.

All committees should:

- Handle club business that falls under their jurisdiction.
- Hold meetings with the president soon after appointment to plan their work.
- Submit tentative budgets and programs for approval by the board and the membership.
- Keep records of work and submit annual reports of work accomplished to the president at the end of the fiscal year.

Every member should serve on a committee during your year in office. Each committee should involve all of its members in its work.

ORIENTATION OF NEW OFFICERS

The president is responsible for making sure that officers get started in a positive direction at the beginning of their term. Therefore, you should encourage new officers to:

- Ascertain the duties of their office.
- Obtain and review the Quota manuals that pertain to their office.
- Study the files of their predecessor.
- Read club bylaws.
- Study *The A-B-C's of Parliamentary Procedure* and learn how to use *Robert's Rules of Order, Newly Revised* as a reference source.
- Remember that accepting membership on a board of directors in any capacity carries with it an obligation to attend all meetings of the board and to carry out other assignments.

Your first duties as president should be to:

- Read this manual.
- Check duties set out in local bylaws.
- Plan your work for the coming year.
- Call first meeting of the board of directors.
- Review committees. If they are no longer vital, eliminate them. If duplicates exist, combine them. Appoint new committees as needed.
- Appoint committee chairs.
- Name committees as early as possible. The best way to interest new or indifferent members is to give them responsibilities on committees, where they become acquainted with the purposes of the organization and with their fellow members.
- Hold an instruction session for officers, committee chairs, and workers.
- Establish an atmosphere of cooperation and confidence among those who will help carry the load.
- Meet with committees to plan the coming year.
- Add the names and addresses of club officers to your notebook of Quota information. Also add city officials, legislators, and other important contacts to this quick reference listing.
- Inventory club supplies and replenish club forms.

Another important presidential duty is to see that the new treasurer begins work immediately. It is important that you be familiar with the treasurer's duties as you work with this individual to ease her or his transition into office.

The first duties of the treasurer are as follows:

- Obtain and read the *Quota Club Treasurers' Manual*.
- Be sure the books of the former treasurer are released by audit.
- Notify club's bank of change in officers and sign necessary documents to transfer financial authority.
- Check files, ledgers, and other necessary information.
- Obtain an up-to-date membership list that includes members' names, addresses, and standings in relation to dues.
- Be prepared to report on the club's financial status at all times.
- Review club bylaws for current rates of initiation fees, annual dues, and other financial obligations.
- Ascertain that dues are being collected efficiently.
- Check supply of dues pads, membership cards, and other supplies.
- Meet with retiring treasurer to go over national and state (or province) tax files and other government requirements.

You should have a close rapport with the club secretary, so set aside a time the two of you can review the *Quota Club Secretary's Manual* to see if the instructions therein fit your plans.

TOOLS OF OFFICE

Our website, www.quota.org, contains a myriad of helpful resources. The list below provides a brief synopsis of each item to help you navigate to precisely what your club needs. It is your responsibility as club president to see that club officers have the tools they need to do their job.

Club Success Guide. This 25-page guide that is MUST READING for every new club president is filled with strategies on how to strengthen your club's recruitment and retention. It includes the Excellence Award-winning "Partners Program" on connecting new club recruits from the start.

+1 Club Planning Guide. Another excellent tool that can help you strengthen your club's membership recruitment and retention efforts is our +1 Club Planning Guide. The guide is filled with advice from successful clubs on every aspect of membership and club operations.

Club Treasurer's Administrative Guide. Provides your club treasurer with an easy to follow format to assure proper management of your club's funds. Guaranteed to take all uncertainty out of serving as club treasurer.

Club Secretary's Administrative Guide. Designed to answer your club secretary's questions about duties and responsibilities.

Club bylaws. Rules written locally to meet club needs. Write headquarters for suggested format.

The A-B-C's of Parliamentary Procedure. Booklet that explains official parliamentary procedure in layman's terms. Clubs outside the United States may choose a nationally recognized parliamentary authority.

Publicity Pointers. Our detailed directions and ideas for publicity and public relations will help your club improve its image in the community and get recognition that keeps club members coming back for more.

Quota Cares Month Planning Kit. This comprehensive guide to planning a service event that commemorates Quota Cares Month will strengthen your club, and includes tips for recruitment, service, and fundraising.

Quota Logo and Stationery. Both the new Quota "Q" logo and the traditional registered Quota trademark "Q" are available electronically on our website for your club's brochures or promotional items and letterhead. Sample artwork for club stationery with the new Quota logo may also be found on the website.

Quotas' Seventy Years of Service. A 32-page history of Quota that offers an insightful glimpse into Quota's proud past and exciting present. No Quota member should be without one.

Quota International website at www.quota.org. This site includes a wonderful array of resources, photographs, and publications, including our archive of magazines like *The Quotarian* and the *World Service e-Zine*, and all of the documents listed on this page.

Quota International Facebook page at www.facebook.com/QuotaInternational. Obtain publicity for your club's activities and collaborate with clubs across the Quota world!

Media Programs, PSAs, and Jingles. On our website you can view past videos about Quota caring and Hand-in-Hand world service. Our public service announcements can also be used to raise Quota's visibility in your community. Or, download musical jingles created just for the former Quota International and use them in creating your own, updated, club radio or TV public service announcements.

CONDUCTING A MEETING

Properly conducted meetings help create an effective and harmonious organization. Every presiding officer should know the fundamentals of parliamentary procedure and how to conduct meetings efficiently to protect the rights and privileges of all members. Each local club should adopt an order of business to follow; changes in this order should be made only with the consent of the membership.

1. *Call to order by the president.*
1. *Review of the minutes.* The secretary distributes copies of the minutes to members. The membership is given time to read the minutes, after which the president asks for corrections or additions. If none, the president states that the minutes are approved as written.
2. *Review of treasurer's report.* The treasurer's report is distributed for members to read. After the membership has been given a few minutes to read the report, the president asks if there are any questions. If none, the report is filed for audit.
3. *Discussion of items requiring decisions.* Many groups save the decision-making process for the end of the meeting. This is not a time when member attention is at its best. Items requiring decision making should be near the top of the agenda to ensure that the best decisions are made.
4. *Summary of decisions.* An official reading or handout summarizing the decisions should be presented to all members.
5. *Distribution of reports.* All reports should be written and distributed to members for them to read. Since the reports are distributed, they do not have to be read aloud. Questions for clarification should be taken and answered.
6. *Announcements.* Announcements from committees and individual members should be made at this point.
7. *Quota Collect.* A motion for adjournment is entertained and accepted, as well as a second to the motion. The Quota Collect is then read.
8. *Adjournment.* The president declares the meeting adjourned.

DEFINITIONS OF COMMONLY USED TERMS

1. *The House*--the organization, the assembly, the club.
2. *The Chair*--the presiding officer, usually the president.
3. *To Address the Chair*--to speak to the presiding officer. Address as "Madam or Mister President" or "Madam or Mister Chair."
4. *To Obtain the Floor*--to obtain permission to speak from the presiding officer. No one may speak unless recognized by the chair.
5. *Pro Tem*--for the time being, acting in the place of (i.e., secretary pro tern).
6. *Ex Officio*--a member of a committee who is so designated in the bylaws by virtue of the office, usually the president. The president has every privilege--the rights to make motions, to debate, and to vote--but should not be counted in the quorum of the committee.
7. *Quorum*--the lowest number of members that must be present at a meeting to transact business. Number that constitutes a quorum should be stated in the bylaws. If it is not, the quorum is the majority of the entire membership according to *Roberts' Rules of Order, Newly Revised*.
8. *Quorum of a Committee*--majority of the entire committee, unless otherwise stated in the bylaws.
9. *Parliamentarian*--an advisor to the presiding officer on parliamentary procedure. Only the president makes the rulings.
10. *Minutes*-- the record of business of each meeting, kept by the secretary. Minutes should be a permanent record.
11. *To Make a Motion*--to propose that the assembly take certain action. Stated, "I move."
12. *To Second*-- to assert a second person's interest in voting on a motion just made. Necessary in most motions to bring the matter before the house for consideration. Stated, "I second the motion."
13. *The Question*--the pending matter before the house for consideration.
14. *To Amend*--a motion to change or modify a pending motion.
15. *To Ballot*--to vote by casting ballots; a secret vote.
16. *To Adjourn*--to dismiss or end a meeting.
17. *Votes*
 - Majority vote*--anything over half of those present and voting.
 - Plurality vote*--highest vote.
 - Tie vote*--same number for and against.
 - Unanimous vote*--given by general consent of all members.
 - Voice vote*-- ayes and "nays."
 - Standing vote*--rising vote, usually a counted vote.
 - Ballot vote*--secret vote.
 - Roll call vote*--voice vote by calling roll of members.
 - Proxy vote*--vote cast for another by authority given. Allowed for only by bylaws.
 - Vote by mail*--method must be provided for in bylaws. Don't confuse with proxy vote.
18. *Agenda*--items to be discussed in meeting under "order of business."
19. *Division of Assembly*--when there is doubt as to accuracy of an announced vote, any member or the chair may call for a re-vote. A counted vote may be ordered by a majority vote or by the chair.
20. *Division of a Question*--request for consideration of one thing when a motion is made containing several parts relating to the same subject.

21. *Consideration Seriatim*--consideration, section by section or paragraph by paragraph, to perfect each before voting on an entire question.
22. *President's Voting Privilege*
In a ballot vote--the president votes as another member when the polls are open. The president cannot vote to break a tie.
In a voice vote--the president does not vote except to make or break a tie. The president may:
 - Vote with the affirmative; motion carried.
 - Vote with the negative; motion lost.
 - Choose not to vote; motion lost.
23. *Session*--convention is one session, with meetings on successive days within the session. A one-day session consists of morning, afternoon, and evening meetings.
24. *Voting Method*--the method of voting during the discussion of a pending motion. For instance, a motion may be made, "I move that when the vote on this matter is taken, it be taken by ballot" (roll call or any method other than voice). It is not debatable. It is amendable and takes a majority vote. When the method is determined, the discussion on the pending matter continues, and when the vote is taken, it is taken by the method determined by the motion.

COURTESY

Courtesy is "a favor performed with politeness" and is always in order. Guests appreciate it, and new members who are strangers will become friends if they are made to feel welcome and at home. Give them something to do so they will belong.

The same rules of courtesy that you would use in your home apply within your club. It is highly desirable to have a hospitality chairman to meet guests and to make them comfortable.

Although there are general rules of courtesy, there are none that cannot be departed from if the situation makes it seem advisable. Ironclad protocol is accepted as a must in diplomatic circles in governments and between governments, but in society there should be no rigid protocol. We honor those who serve an organization according to the degree of responsibility they accept, but such members are not forever set apart. After all, membership in an organization is the greatest honor in an invitational society.

Seating

Protocol on the seating and the introduction of speakers and guests varies in different countries. No ironclad rules apply to all occasions. Good taste and good judgment must govern in all cases.

Generally, the first honored guest is introduced first, then in order, the next honored guests. This order may be completely reversed in making introductions, by starting at the end of the line and leading up to the first honored guest as the climax. The latter procedure is effectively used when the first honored guest is to speak immediately after being introduced.

The head table. Following is the correct seating arrangement for the head table:

7th Guest	5th Guest	3rd Guest	1st Guest	Presiding Officer	2nd Guest	4th Guest	6th Guest	8th Guest	Guest
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Determining the order of importance in seating guests is a question that must be decided in each individual case. Generally, the top ranking officer of the organization is the first honored guest. Only a public official of high rank or a widely known figure would supersede such a person. In that case, the visiting official would sit to the right of the presiding officer and the top ranking officer to the left. In other cases where public officials are present, the entertaining group must decide protocol.

Elected officers usually take precedence over appointed officers and chairs. For example, the district or regionally elected official would take precedence over an appointed member of an international committee. If a club is the entertaining unit, the international or regional elected officers would take precedence over officers of the host club.

The speaker's table should not be too long. Honored guests not seated at the speaker's table may be seated at additional tables, which should be placed directly in front of the speaker's table.

At a luncheon or dinner meeting, it is courteous to give credit to the chairperson of arrangements and the members of the committee, but this should not be overdone.

Speakers

Speakers should be given advance information as to the time and place of the meeting, the type of meeting and the desired time limit of the speech. If the speaker is a Quota officer or committee chair, transportation expenses should be paid and accommodations provided. If the speaker is not a member of Quota, an understanding should be reached as to expenses and fees when arrangements are made.

It is discourteous to keep a speaker waiting during a long business or program meeting. Arrange the agenda so that the speaker is presented at the appointed time. When introducing speakers:

- *Be brief.* Do not make the speaker's speech.
- *Be factual.* Do not embarrass the speaker with a too-flowery introduction.
- *Be kind.* Put both the speaker and audience at ease. The more important the guest, the shorter the introduction should be. Never say to an invited guest, "Would you like to say a few words?" This is no compliment. It is better to arrange speeches privately and before the meeting.

OPENING THE DOOR TO NEW MEMBERS

Growth is vital to Quota. As president, you will want to make sure that your club has a constant influx of members, one that more than balances the natural attrition rate. Urge your membership committee to try novel approaches in looking for prospects. Have them ask each club member to seek out a counterpart in a company with which she does business. Check the phone book for categories likely to produce prospects--stores, banks, insurance companies, hotels, radio and television stations, etc. Go through city directories and other official lists.

Rule 28. Acceptance of New Members

Article XIV: Clubs

The procedure for acceptance of new members in a local Quota club shall be determined by the local clubs:

- A. Individuals identified as potential new members shall receive a statement of all obligations of membership (financial, service, and attendance where required) accompanied by the necessary membership form.
- B. Membership will commence upon the acceptance of the completed membership form, initiation fee, and dues by the club.
- C. A formal invitation shall be extended to the prospective member, accompanied by the necessary membership form. If the invitation is accepted by the prospective member, the completed form shall be returned to the club with the initiation fee and dues.
- D. Membership in a Quota club shall begin on the date of acceptance of the new member form, initiation fee, and dues by the president of the local club.

This is only the beginning. How well you inform new members and how soon you make them feel like a vital part of the club will determine whether or not they stay. Refer to the Quota publication, *Rites of Initiation*, for advice on new member orientation.

INITIATION & INSTALLATION CEREMONIES

Quota has no official ceremonies for the initiation of new members or for the installation of club officers. Since 1965, the official policy has been to encourage club officers to employ the talent and imagination of their own members to develop ideas for such rites. So ceremonies often vary from country to country and sometimes among clubs in the same area.

Here and there, Quotarians have followed the same formal ceremony for so many years that it has become the established tradition for that club. Elsewhere, ritual has been dropped in favor of more relaxed initiation and installation programs, which often feature symbolic props ranging from candles to potatoes. Pins seem to be a general standard, with the club providing membership pins for new members and special pins for presidents and retiring presidents.

Prepare an outline for your club's initiation program, and distribute it to all participants so that each will be ready for her or his role. Make written lists of props, pins, scripts, documents, and decorations and assign a member to get them to the lectern or other designated areas in advance or discreetly during pauses in the ceremony. When plans call for movement of groups to and from center stage or complex interchanges of people, insist on rehearsals.

Sample ceremonies are available in the “Rites of Initiation” and “Launch Your Leaders” documents on www.quota.org.

CLUB SERVICE PROGRAMS & ANNUAL CAMPAIGNS

Cops ‘n’ Kids Literacy Program/QuoCKa (in Australia) Program

Quota’s Cops ‘n’ Kids Children’s Literacy program provides at-risk children access to books while fostering positive relationships between children and police. Quota clubs have brought together volunteers and law enforcement officers to collect and distribute books for children. They hold fund-raisers, construct reading rooms, read aloud to children, organize book drives, and more. To learn more, connect with clubs in Australia via the [Quota Australia Facebook page](#).

JQ (Junior Quota) Club Youth Mentoring Program

Through Quota’s JQ Club Program, Quota clubs sponsor local middle school, high school, or college students to help them develop leadership skills and perform meaningful service work. With mentoring from Quotarians, Junior Quotarians—JQs—become effective leaders who can communicate, delegate, solve problems, and serve their communities. Every community has youth who would benefit from Quota guidance, mentoring, and support. To learn more, reach out clubs currently sponsoring JQs via the [Quota International Facebook page](#).

Hand-in-Hand World Service Program

Quota’s award-winning Hand-in-Hand World Service Program, initiated in 1983, continues on after the dissolution of Quota International as a program overseen by former Quota leader volunteers. Run by local former Quota clubs who understand the specific needs of their own communities, these effective, hands-on service projects provide practical support for real people in desperate need. Previously, Quota members and clubs contributed tens of thousands of dollars each year to support them. Every penny donated to these Hand-in-Hand projects reaches its intended project target. To learn more or to donate, go to [Hand-in-Hand World Service Program’s Facebook page](#).

Quota Cares Month Public Awareness Campaign

Quota Cares Month is an annual international event that connects and involves ALL clubs worldwide at the same time. The goal is simple: every club is invited to plan one special, newsworthy service project in its local community every March.

Listen Up! Turn it Down Campaign

Every day, noise causes hearing loss in millions of people around the world—people of all ages. In fact, children today usually have suffered Noise-Induced Hearing Loss (NIHL) by the time they are eight years old making education efforts critical. Join Quota in a campaign to increase awareness of the dangers of noise, particularly in children, and provide practical tips for protecting hearing health. Get started with these helpful resources! Quota’s Listen Up, Turn It Down Program Guide is a step-by-step plan for educating yourself, your club, and children and adults in your community about Noise-Induced Hearing Loss through a public awareness initiative. Includes numerous links for materials to download and share.

ABOUT QUOTA

Organized in 1919 as the first international women's service organization, Quota's international structure dissolved in 2020, after 101 years of collective service. However, membership today continues in countries worldwide, operating a national and local level and run by volunteers instead of paid staff. To connect with clubs who have continued on after the dissolution of the international structure, go to www.quota.org and click on "Connect".

For more complete information about Quota, its history, bylaws, current leaders, past international presidents, past conventions, an overview of Founder Wanda Frey Joiner, information about active clubs and how to contact them, awards and honors and more, go to www.quota.org and visit the "About" and "Member Center" pages which also hold a myriad of additional resources for club leaders.

Quota's Mission and Shared Values

Mission

Quota's Objects, which were established in 1919 and revised in 1996, serve as Quota's mission (QI Bylaws, Article II):

"The business, mission and objects of Quota International shall be to seek individuals of diverse occupations committed to sharing their time, talent, and resources to meet Quota International's service goals, and more particularly:

- *To serve country and community;
- *To promote high ethical standards;
- *To emphasize the dignity of all useful occupations;
- *To develop good fellowship and friendship; and
- *To advance the ideals of righteousness, justice, international understanding, and good will."

Shared Quota Values

With a motto of "We Share," Quotarians are known especially for their service to deaf, hard-of-hearing, and speech-impaired individuals and disadvantaged women and children. Serving others, developing friendships, and promoting international understanding are values shared by members.

The Quota Collect defines and honors Quota's shared values:

"Quench in our hearts, O Lord, all fires of selfishness. Unfold to us the joys of true friendship. Open our minds to a better understanding of service. Teach us the real meaning of sharing. And help us to hold high those principles of Quota for which we stand."

Major Service Programs. Following is an overview club service programs and annual campaigns, turn to page 27.

GENERAL COMPREHENSIVE LIABILITY INSURANCE

It is strongly recommended that Quota clubs obtain general comprehensive liability insurance to protect from lawsuits, particularly those that might result from accidents at public events. Quota recommends that clubs contact a local insurance provider to establish and maintain a liability insurance policy.

RECORD RETENTION FOR CLUBS

Record Retention Guidelines

Following are guidelines for retaining your club's records:

- *Computerize club data.* With the abundance of home computers, and other personal technology devices, more and more clubs are computerizing records. This eliminates the problem of having to store boxes of bulky records, but it does carry a risk of its own. Unless you make frequent back-up copies of files, and use secure passwords on your accounts, your club could lose all of its data through accidental deletion or a hacked account. Take extra precaution by making multiple back-up copies of the data and storing them in different secure places, all of which should be fireproof and protected from extreme temperatures for physical backups, and password protected for digital copies. Make sure that such records are cataloged at regular intervals and that a current record is passed out to club officers.
- *Keep paper records minimal and mobile.* Because very few Quota clubs have a permanent office in which to store their files, it is important to keep original club records as minimal and moveable or as digitized as possible. Weed out superfluous material frequently and date sections clearly for convenient culling at the end of the retention periods recommended in the chart on the next page.
- *Appoint an accountable custodian.* Some clubs appoint an official custodian of important club records. Generally interested in club history, this individual stores the charter scroll and other early club documents, newspaper articles related to the charter and anniversaries club rosters, newsletters, and other items. Sometimes these items are kept in a special history album. If your club decides to appoint a custodian, limit the appointment to one or two years and have the individual inventory club materials and review the inventory with club officers at the end of her or his appointment. This practice will prevent your records from getting lost because the custodian's identity is no longer known.

If your club holds all of its meetings in the same building or restaurant, inquire about renting space for a file cabinet for storing club supplies and papers. Clubs that have done this claim that such storage space is invaluable.

Among the historical items that clubs seem to lose with great frequency is the club charter that is sometimes framed or stored in its original postal tube. Its awkward size precludes easy storage. To make sure your club always has file copies of this valuable document, have several 8-1/2" x 11" copies made of it. Re-print it occasionally in an anniversary program or a newsletter so that all members know what it looks like.

Record Retention Checklist

The following checklist summarizes a practice that your club could follow:

Bylaws	Permanent
Canceled checks		7 years
Charter		Permanent
Club Rosters		Permanent
Correspondence:		
Inessential (where club has a copy or miscellaneous information letter)		1 year
General (original correspondence pertinent to club matters)		2-3 years
General ledgers and journals		Permanent
Invoices for payment to vendors		7 years
Membership lists		Permanent
Minutes		Permanent
Tax returns (form 990)		
includes worksheets, revenue agent's reports,		
and other documents relating to income tax liabilities	10 years
Internal Revenue Service determination letter		Permanent
Countries other than the United States		
<i>This must be checked with governmental agencies to determine what must be kept on file</i>		Permanent

Be sure to keep permanent records pertaining to the history of your club.