

Get Ready for Success(ion)!

Now that you've elected your club's leaders for next term, what's next? Here are some ideas to start now so your successors are ready to go in October.

Presidents

1. If your President-Elect hasn't run a meeting yet, now is the time. Go over a typical agenda and discuss timing (very important!) as well as what you've learned about what worked/didn't work for you. Then, let your Elect create their own agenda and run a meeting—you can even attend! Be encouraging, but don't interfere. Your Elect will let you know if s/he needs help. Afterward, tell them what they did RIGHT—everyone needs a little positive reinforcement. And help them work through any concerns or issues, so that next time will be even better.
2. Encourage your Elect to start putting together committees and committee chairs for their year. Even if someone has been a committee chair forever, they should be asked if they want to continue by the Elect. And encourage them to mix it up—ask a chair to step aside or train a co-chair, ask members to join new committees, or add a special ad-hoc committee (maybe to plan the installation dinner).
3. Discuss budgeting and get together a budget committee. This is so important and should start before September. Go over the current budget, focusing on any areas where you are significantly under or over budget. Talk about the whys, and about any special situations that might arise in the coming year.
4. Start planning your installation event with your Elect, and be sure to invite your Lt. Governor-Elect!

Secretaries

1. Make sure your Elect is familiar with Kiwanis One and the Secretary Dashboard. Schedule a time to go over the basics (maybe more than once), and show them where they can get additional online training.
2. Go over the process for collecting service hours, and discuss what qualifies as a service hour. Keep in mind that your Elect may want to change the process, and that could be fine, but be sure that they discuss their suggestions with the incoming President.
3. File at least one monthly report with your Elect, so you can answer questions as they come up.
4. Change the mailing address of the club with KI before October 1, if applicable. Or, if the club uses a P.O. box, be sure the Elect knows where it is and how to access it.

Treasurers

1. Review the process for collecting money at meetings and events.
2. Discuss Service funds and Admin funds in detail. Ensure your Elect has a thorough understanding of what items go in each account.
3. Review the annual filings and prepare a calendar with due dates.
4. Review your process for producing the monthly financials, and any software you use, with your Elect. Make sure they fully understand timing of the reports, including when and how bank statements are produced.
5. Introduce your Elect to your banker, and discuss the process for changing account signers. Be sure to make these changes by October 1st.