

Exchange Excel and Jr. Excel Clubs



Organizational Guide for
School Advisors, Exchange
Mentors, and Student Officers

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EXCHANGE

THE NATIONAL EXCHANGE CLUB

Thank you for your interest in forming an Exchange Excel Club! The Exchange Excel Club you establish will improve the capabilities of students and positively impact the school, and the community. This program grows Exchange, increases public service, and encourages community support.

As more high schools require community service for graduation, Exchange Excel Clubs provide these opportunities and expand possibilities. Students involved with peer programs improve their grades as they work with others and share experiences which will influence their future careers and interests.

Organizing an Exchange Excel Club can accomplish many goals. It will take some effort, but there are many rewards. The energy you spend putting the club together enhances all involved, empowering them to make a difference on a larger scale.

What is Exchange?

The National Exchange Club is a network spanning the United States and Puerto Rico, all striving together to fulfill Exchange's Mission, inspiring communities to become better places to live.

The benefits of joining a national, renowned service organization are numerous:

- Access to fundraising and event planning tools that make it easy to be a member - grassroots planning is a thing of the past!
- Developing a network of business professionals, or simply making friends.
- Uniting to spread prevention of child abuse education and awareness throughout the country.
- Representing standards of excellence and leadership in communities across the United States and Puerto Rico.
- Sharing ideas and collaborating about ways to improve communities.
- Building relationships with others in your community.
- Growing as a leader, personally and professionally, through innovative guidance and training offered by a professional National Headquarters staff.

The Covenant of Service

The Covenant of Service, expressing Exchange's philosophy and ideals, was written in 1923 by Exchangite Thomas L. Bailey, who served as National President of Exchange from 1925 through 1927, and later served as Governor of Mississippi from 1944 through 1946. It was officially adopted by the organization in 1927.

Accepting the divine privilege of single and collective responsibility as life's noblest gift, I covenant with my fellow Exchangites:

- To consecrate my best energies to the uplifting of Social, Religious, Political and Business ideals;
- To discharge the debt I owe to those of high and low estate who have served and sacrificed that the heritage of American citizenship might be mine;
- To honor and respect law, to serve my fellowmen, and to uphold the ideals and institutions of my Country;
- To implant the life-giving, society-building spirit of Service and Comradeship in my social and business relationships;
- To serve in Unity with those seeking better conditions, better understandings, and greater opportunities for all.

Vision

A strong America, safe communities, and unified people.

Mission Statement

Exchange, inspiring communities to become better places to live.

Motto

Unity for service.

Core Values

Family, Community, Country

Programs of Service

The National Exchange Club's Programs of Service are: Community Service, Americanism, and Youth Programs - as well as Exchange's National Project, the prevention of child abuse. These programs may be adapted for use, in whole or in part, by any Exchange Club.

Americanism

Americanism is a nonpolitical ideology that encourages pride in our country, appreciation for the freedoms of American citizens, and gratitude to the men and women who have served, and are currently serving, in the Armed Forces. Americanism pays tribute to our country's rich unique heritage and celebrates the diversity of thought, religion, and philosophies that have come to define the United States.

Community Service

Community Service is a cornerstone of Exchange's Mission – inspiring communities to become better places to live. Local-level Exchange Clubs devote countless hours and funds toward community improvement, bridging gaps in services, developing partnerships that enhance opportunities for their neighbors, and sharing members' skillsets. Since the first group of Exchange Club members convened, Exchange has set the bar high for community service involvement!

Youth Programs

America's young people are its most precious resource. For many years, The National Exchange Club and local-level clubs have sponsored an impressive selection of activities designed to benefit and encourage our nation's youth. Through college scholarships at the community and national levels, mentoring and guidance, and service recognition, Exchange is making a difference for America's youngest generations.

National Project - Prevention of Child Abuse

The prevention of child abuse became Exchange's National Project in 1979. To uphold its National Project, Exchange provides a variety of public awareness materials to increase awareness about child abuse and how it can be prevented. Such projects are implemented across the country by Exchange Clubs and Exchange Club Centers for the Prevention of Child Abuse. Through the scholarly-reviewed Exchange Parent Aide home visitation model, child abuse prevention experts work directly with at-risk families.

Why Start an Excel or Junior Excel Club?

To provide students with:

- Leadership opportunities
- Team building and teamwork skills
- The intrinsic rewards of community service
- Volunteerism options
- Scholarship opportunities available from local, district, and National Exchange Clubs
- Networking training
- The ability to fulfill school service hour requirements
- A variety of experiences to submit well-rounded college applications
- Training and mentoring opportunities available from local, district, and National Exchange Clubs
- The experience of setting goals and the steps to successful completion
- Improved communication skills and the ability to identify ways to better communicate
- Increased self-esteem, a sense of belonging, and a higher propensity for success
- A fun, safe, and constructive extra curricular activity

Excel/Junior Excel Club Price List

Charter Fee	\$250
IRS One-Time Fee*	\$50
	\$300 <small>TOTAL amount due on or before Charter Event</small>
Annual Dues	\$12

* The IRS one-time fee is Form 8976 Notice of Intent to Operate Under Section 501(c)(4). This fee is to be paid at the time of the club's charter if the club is not using the school Federal Tax Identification number. The National Exchange Club will file this form once the club has chartered; the club will be provided with the Tax Identification Number.

Details:

1. Charter members do not pay a joining fee.
2. Charter members may be added up to 30 days from the Charter Event date.
3. Members joining 30 days after Charter Event date will be invoiced for prorated dues.
4. First national billing occurs 90 days from the charter date.
5. Excel and Junior Excel Club billing is collected annually on October 1st based on the September 30th membership roster.

Starting an Exchange Excel Club

Making the decision to start an Exchange Excel Club is the hard part. Once you've decided to begin, just follow these simple steps to get things off the ground. If you have any questions, contact Exchange's National Headquarters.

1. Locate a high school or alternate location where you will form your Exchange Excel Club.
2. Wherever the Excel Club is built it is important to seek the approval and cooperation of the administration. Since the majority of Excel clubs are located in a school make sure that you are meeting the school districts expectations for any extra curricular club. Next, secure the permission of each school principal from which you plan to have students involved. (You may want to organize your club within your district/county to ensure the recruitment of enough members and allow for more interaction.) When seeking approval, share your overall goals for the club and the procedures for selecting members. Those involved should have the desire to make a positive difference in the quality of education and service to all students, as well as their community.
3. Identify Exchange club members that will be mentors the Excel club. Every Excel club should have advisors involved from the school. Ideally, a school teacher, guidance counselor or other staff member teams up with the Exchange members who wish to serve as a mentor for the Excel club. The sponsoring club provides at least two mentors to aide and mentor the Exchange Excel Club. This type of team can establish a sense of ownership that will create a solid foundation. Having a team to work with allows the club officers to be more resourceful and will give the students the

support they need.

4. To learn more, fill out the [New Club Building Notification Form](#) or contact Exchange's National Headquarters.
5. Recruit a minimum of 15 members; list the names of the club members on the [Prospective Member/ Membership Listing](#), and then submitting the roster to Exchange's National Headquarters when the new club charters. A completed application and club dues can be obtained by the club upon each member's joining. Exchange's national dues are \$12 per student, which is initially billed 90 days after a club's charter, then annually on October 1.
6. Elect officers. Every club needs leadership. A list of positions and responsibilities can be found in the next section. You will also need to submit your list of on the Charter Event Paperwork and annually on the Member Resources page of Exchange's website.
7. Develop an action plan and establish your goals for the year. Club members should also be involved in establishing the goals for the year.
8. Involve parents and families. Be sure to include parents as much as possible. Invite them to appropriate functions and make them aware of all the activities. Family involvement is important in any child's education, volunteer work, and extracurricular activities.

Recruitment Suggestions to Get You Started

- Ask the local sponsoring Exchange Club and the advisor to introduce the club during an activities fair, freshmen orientation or morning homeroom . This is a good time to pass out brochures or show Exchange videos.
- Ask the local Exchange Club to sponsor a picnic, fair, sporting event, or activity with families and students.
- Invite interested students to attend, or ask for volunteers to help with an event. This volunteer activity can be your key for recruitment.
- Discuss the advantages of students working together to build friendships and influence positive changes within their schools, the community, and their own lives.



Promote and publicize this new club wherever you are most likely to reach potential members. Consider videos, social media, school announcements, and publications. The more people that are engaged, the more quickly the new club will see success.

Excel Club operation - Running the club

Every club should have officers who can lead the club in a positive direction. The election of officers helps students gain leadership skills which will benefit them in the future. The club is led by students whenever possible. By encouraging student officers to assume responsibility, you are teaching the students leadership skills and helping them to take ownership over the success of the new club.

The information included in this section suggests a format for providing students with an organized structure for running their Exchange Excel Club.

To better govern your club and to accomplish tasks more effectively, you may want to form an executive committee consisting of the president, vice president, secretary and

treasurer. The high school club advisors usually serves as an ex-officio, nonvoting member of the executive committee. After talking with all club members, this group of officers plans to meet regularly to establish the goals of the club, and then help carry out those goals by planning club meetings, events, and activities.

The suggested responsibilities of the executive committee are:

1. To implement the administrative policy within the budget limitations;
2. To give direction in solving club problems;
3. To act upon all official petitions and recommendations received from the members and school administrators;
4. To establish standing and ad hoc committees as needed; see [Club Leadership Guide](#) for suggested committees;

5. To hold elections for club officers and to appoint a nominating committee;
6. To assume such other responsibilities as determined in the bylaws of Local Exchange Clubs and the policies of the school or organization where the Excel club meets.

The Executive Committee

The executive committee is the group responsible for establishing the goals, objectives, activities, plans, and evaluation for the year. Because they are elected, they should poll club members about their wishes and interests for the club. Please find information on goal-setting within the information sheet entitled "[Welcome To an Exchange Excel Club Meeting](#)". Before doing your planning for the year, you may want to conduct a brainstorming session with all members and ask them to complete this form so the executive committee is aware of the needs of the members.

The executive committee also plans each meeting of the club. Having an agenda is an effective means for keeping order and getting things done. [The Exchange Excel Club Meeting Agenda](#) is a great tool to help the executive committee plan and organize the club's first meeting.

Advisors

1. Facilitate the coordination of all activities regarding the club;
2. Initiate recruiting of prospective members;
3. Develop proposed goals and a calendar of events based on student input;
4. Communicate with sponsoring Exchange Club to inform them of activities in which they can participate or when their assistance is needed;
5. Speak to groups such as the PTA, Education Association, or Boosters Club to receive support;
6. Ensure the club activities are properly recorded in Exchange's database to guarantee recognition and awards.
7. Encourage and help nurture leadership skills among the members;
8. Allow members to do as much as they can by themselves.

President

1. Work with advisor in setting calendar of events, planning agendas for meetings and recruiting members;
2. Preside over all meetings;
3. Serve as the spokesperson for the club;
4. Share information from the local Exchange Club and National Headquarters as it is received;
5. Assist in fundraising and planned activities;
6. Conduct elections of new officers;
7. Ensure all club members, officers, and projects are entered in Exchange's database with the help of the Advisors and Exchange Mentors.

Vice President or President-Elect

1. Assist the president with fundraising and planned activities;
2. Preside over meetings in the absence of the president;
3. Recruit members and future leaders for officer positions;
4. Serve as chair of at least one activity or fundraiser.

Secretary

1. Maintain records in Exchange's database on all members, including names, phone numbers and addresses;
2. Take minutes at all meetings and send out invitations and thank you notes. Send copies of any minutes to the sponsoring Exchange Club;
3. Assist president in completing all website information;
4. Prepare pertinent articles for the school newspaper or announcements of events;
5. Report programs and activities as each project is completed in the programs of service area on the website.

Treasurer

1. Keep proper itemized accounts of receipts and expenditures;
2. Present financial report at each official club meeting;
3. Assist the advisor, presiden, and other officers in preparing an itemized budget for the year;
4. Assist with fundraising activities by collecting and depositing money.
5. Update club roster and pay all dues and fees. It is very important to work with the secretary to update the current member roster on the website prior to October 1 billing.

Newsletter Editor (optional)

1. Collect information and write articles for newsletter;
2. Work with other students who wish to write articles;
3. Develop flyers or announcements for meetings, social events, fundraising activities, etc.

Class Representative (optional)

1. Represent the voice of individual school classes;
2. Serve as the public relations person and share information;
3. Coordinate class activities that promote Excel awareness.

Historian (optional)

1. Keep records of all publicity, pictures, and minutes that are related to the club's programs;
2. Serve as the photographer;
3. Begin a scrapbook that can be passed down each year.
4. Keep Facebook page current. Send updates to sponsoring club.

Setting goals

As you plan out the Excel club's year, here are a few things to remember and some forms that will be helpful:

Establish a day to plan and organize.

Plan to meet with the executive committee. The president should work with you to set the agenda, and focus the meeting on setting goals for the year.

Do some planning!

[This sheet](#) can be copied many times and used by the executive committee to establish the goals, objectives, activities, preparation and evaluation needed for each activity.

Create a calendar. Create a master calendar. Assigning dates to activities, events and programs increases their chance of success. In addition, club members are aware of activities and can plan accordingly.

Evaluate your work.

[This general evaluation form](#) can be used after each activity, event or program. Conducting an evaluation will help you find your successes and determine areas for improvement. If this form is too generic, create your own, but don't forget to do an evaluation.

For more information, see the
Club Leadership Guide or Exchange's website,
NationalExchangeClub.org.

Charter Event

Charter Event Planning Meeting

The Planning Meeting allows you to prepare for the Charter Event. In the meeting, it is important to assign committees to:

- Review the Policies, Bylaws and Branding Guide.
- Make suggestions on dues;
- Select a meeting location;
- Determine the time of meetings.

You also need to have a Nominating Committee responsible for finding individuals interested in being charter officers for the club. It is also a good idea to form a committee to identify where and when you will have your Charter event.

[Charter Event Planning Meeting Suggested Agenda](#)

Charter Event

The Charter Event is the event your New Club Building Project becomes an official Exchange Excel Club. The guidelines for reaching the Charter Event are:

- 15 signed/paid individuals; 11 of whom do not belong to another Exchange Club;
- A date for the Charter event has been set.
- Contact with National Headquarters to request a National Representative.

[Charter Event Suggested Agenda](#)

[Excel Charter Event Script](#)

Other Ideas

1. Send the media and public officials special invitations to the charter ceremony.
2. Ask a government official to provide a proclamation welcoming the new club.
3. Place a "birth" announcement in your newspaper's classified section stating the name of the new club, when it was chartered, its "weight" (the number of members) and the proud sponsors.
4. Repost National Exchange Club's Facebook announcement of your new club on your club's page, along with posting on sponsor and district Facebook pages, newsletters, and websites!

Press Release/Social Media Templates

[Member Recruitment Press Release](#)

[New Club Building Press Release](#)

[New Club Chartered Press Release](#)

Charter Event Checklist

Forms and payment must be received at National Headquarters before a club can be included in Exchange’s membership records and a club account established. **(The date of the Charter Event is the official charter date of a new club.)** Please adhere to the timetable. Contact Growth@NationalExchangeClub.org for more information.

For Use by Club Builders (prior to Charter Event)

1. Invitation to join – Applications and payment are to be completed by charter members. After the 15th member has signed up and paid, a roster sheet needs to be scanned and send to National Headquarters; charter members do not pay joining fees to National Headquarters and may be added up until 30 days after the Charter Event; so, continue to recruit! First club billing occurs 90 days from the charter date. A minimum of 15 members is required to organize a new Exchange Club. (No dual membership in Collegiate Exchange Clubs shall be credited towards the fifteen 15 members required to build a club.)

2. Once Charter Event date has been set – Club builder emails request for National Representative to: Admin@NationalExchangeClub.org; copying Growth@NationalExchangeClub.org. Include suggested new club name, club builders, sponsoring club name, date, time, and location address of Charter Event and/or link to virtual event.

Official name of the new club will be reviewed with policy requirements. The name of the new Exchange Club must pertain to a specific city, township, county or geographic area. (One or two names before “Exchange Club” or “Junior Excel Club”, such as “breakfast”, “Network”, “Evening”, “Business Masters”, and one name after, followed by the state which the club is located.) Examples: Breakfast Exchange Club of Toledo, Ohio; Business Masters Exchange Club of Coffeerville, Kansas

3. New Club Supplies – Optional items are available at NationalExchangeClub.org and following the SHOP button link.

For Use by National Representative (at Charter Event)

Send scanned forms to National Headquarters within 24 hours of the opening event.

1. Charter Event Report - Club builder to prepare prior to National Representatives arrival.

Exchange Club Mentor Commitment - The sponsoring club and team is responsible for mentoring.

[Charter Event Paperwork](#)

2. Membership Listing Spreadsheet - [Found here](#)

3. Charter Fee Check - \$250 + \$50 IRS fee (Only if not using the school Tax ID#)

Scan or photograph the check to be processed electronically immediately after or prior to Charter Event; or call National Exchange Club Headquarters to process a credit card.

All other fees can be referenced in the [Exchange Excel/Junior Excel Club Price List](#).

4. Photo of the Group - to include club builders, new members, and National Representative.

NOTES: National Headquarters will file a request for Federal Tax ID number (IRS form SS#4) on behalf of the new club. National Headquarters will forward federal tax ID number and letter of determination to the club upon receipt. Form 8976 Notice of Intent to Operate \$50/IRS one-time fee under Section 501(c)(4), to be paid at time of charter. Dues, fees, requirements and Exchange Rewards are subject to change at discretion of membership vote at National Convention or by action of the National Board of Directors.

Membership Committee Report

Detach and give this sheet to the chairperson of the Membership Committee. Report will be made during the Charter Event.

A minimum of 15 members is required to organize a new Exchange Club.

The Membership Committee reports as follows:

We have _____ members who have completed the membership application and paid the joining fee.

Give this form to Membership Chair or Secretary to be kept in club file.

Nominating Committee Report

Nominating Committee: When electing Officers and other members of the Board of Directors, the President shall appoint a Nominating Committee and shall designate its chairman, who shall present to the club at its annual election meeting the names of those nominated as Officers and Directors of the club. Additional candidates may be nominated from the floor. All Officers and Directors shall be chosen by ballot, except when nominations are unopposed, when only a voice vote is needed to elect. A majority of all votes cast shall be necessary for the election of an Officer or other member of the Board of Directors of this club.

Detach and give to the chairperson of the Nominating Committee. This report will be made during the Charter Event.

The Nominating Committee reports as follows:

For President: _____

For President-Elect: _____

For Secretary: _____

For Treasurer: _____

Other Members of the Board of Directors:

Term Expiring June 30, ____:

Term Expiring June 30, ____:

"I move the acceptance of this report."

Give this form to Membership Chair or Secretary to be kept in club file.

Bylaws Report

Detach and give this sheet to the club's Board of Directors. This report will be made during the Charter Event.

The name of this Club shall be the _____ as chartered by The National Exchange Club.

Our purposes will be to help our community by providing service programs for the betterment of the community, to promote actively the Program of Service of The National Exchange Club and its National Project, the prevention of child abuse and to actively participate with The National Exchange Club and Districts of Exchange in establishing new Exchange Clubs.

The management and policies of the Club, not otherwise mentioned in the Bylaws, shall be under the direction of the Board of Directors.

The membership of the Club shall consist of individuals of good character and community standing.

Membership dues and meal charges for active members shall be \$ ____ per month, payable (quarterly/monthly) in advance.

This Club shall hold Board of Directors meetings and shall determine its regular meeting on such a day and at such a place. It may hold such other meetings as the Board of Directors of membership may desire. Regular meetings of this Club shall be held throughout the year, and at least two times each month.

Members who fail to pay charges invoiced to them within sixty (60) days from the time an itemized statement is rendered to them, may be dropped or suspended from membership by two-thirds (2/3) vote of the members of the Board of Directors present and voting at any meeting of said Board.

This Club, chartered by The National Exchange Club is a member of the _____ District Exchange Clubs, whose members shall have all rights and privileges in the District as outlined in the National Exchange Bylaws.

This Club shall be entitled to representation to attend the annual Convention of the _____ District Exchange Clubs and The National Exchange Club.

These Bylaws may be amended by a majority vote of the voting members present and voting at any regular meeting of this club. The National Committee on Jurisprudence and Laws must approve amendments prior to being mailed to the club members for consideration.

"I move the acceptance of this report".

To be completed by Club President or Secretary to be kept in Club file.

Keeping Excel Clubs Strong Year-After-Year

Exchange Excel Clubs that actively plan during the last few months of the current school year show increased membership at the beginning of the following school year!

Follow this “strength training program” to get things in order for the coming fall:

- Elect incoming officers during the spring.
- Plan a fun event or social get-together to keep club members connected over the summer break.
- Establish seamless access to the tools provided on Exchange’s website by setting up a Member Login for Exchange’ Member Resources page for officers, advisors, and the mentoring support team.
- In the fall ensure the club’s roster is current (removing graduates, other past members, and those who have not paid their dues) on Exchange’s Member Resources page, which will allow National Headquarters to share exciting information with all members having valid emails and guarantees proper billing.
- Verify with the club’s treasurer that the club is up-to-date on national dues; Excel Clubs are billed annually on October 1.

Excel Club members can also consider attending Exchange Club meetings with their parents and fellow students. Excel Clubs can have their sponsoring club(s) induct the incoming officers each year.

For additional tips about strengthening your Excel Club, or how to #GrowExchange, contact Growth@NationalExchangeClub.org.



facebook.com/nationalexchangeclub



twitter.com/exchangeclub



instagram.com/nationalexchangeclub



youtube.com/exchangeclub



EXCHANGE
THE NATIONAL EXCHANGE CLUB

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