



# District 4-A1

President - Secretary - Treasurer  
and Club Chairs

## Handbook IV – September 2024

This handbook is a support for you. We hope that you will recommend changes and additions to continue to improve and build this document as a support for future Presidents and Secretaries.

Claudia Miller





# FIVE EFFECTIVE STEPS OF OWNERSHIP

You can use these steps in any form of communication. Write them out when responding to emails. As you practice for a challenging discussion, talk through each step in a role play. Utilize it during those hard conversations. Each step in this process is critical to addressing challenging situations and having difficult conversations. Use these steps as often as possible to cultivate the habit of taking ownership.

## 1. PROBLEM

### EXPLAIN THE PROBLEM

The key to this step is to correctly identify the problem. Be sure you are not mistaking a symptom for the real problem. Figure out how YOU caused the issue. That is the real problem.

## 2. CONSEQUENCES

### RECOGNIZE THE IMPACT TO THE TEAM AND THE MISSION

This step is often missed but is extremely critical. Focus on the consequences of this problem – how this problem impacts the person you are speaking with and the entire team.

## 3. OWNERSHIP

### TAKE OWNERSHIP

Always take full ownership. Do not use words that gloss over the ownership. Use “this is my fault” or “this is 100% on me” instead of “I might not have...” or “I probably contributed to this”.

## 4. SOLUTION

### PROVIDE A SOLUTION

Focus on what YOU will do to correct the problem moving forward. It should not be about asking for any action from the other person. Provide a realistic solution on which you can take action at your level to solve the problem.

## 5. IMPLEMENTATION

### FACILITATE IMPLEMENTATION OF THE SOLUTION

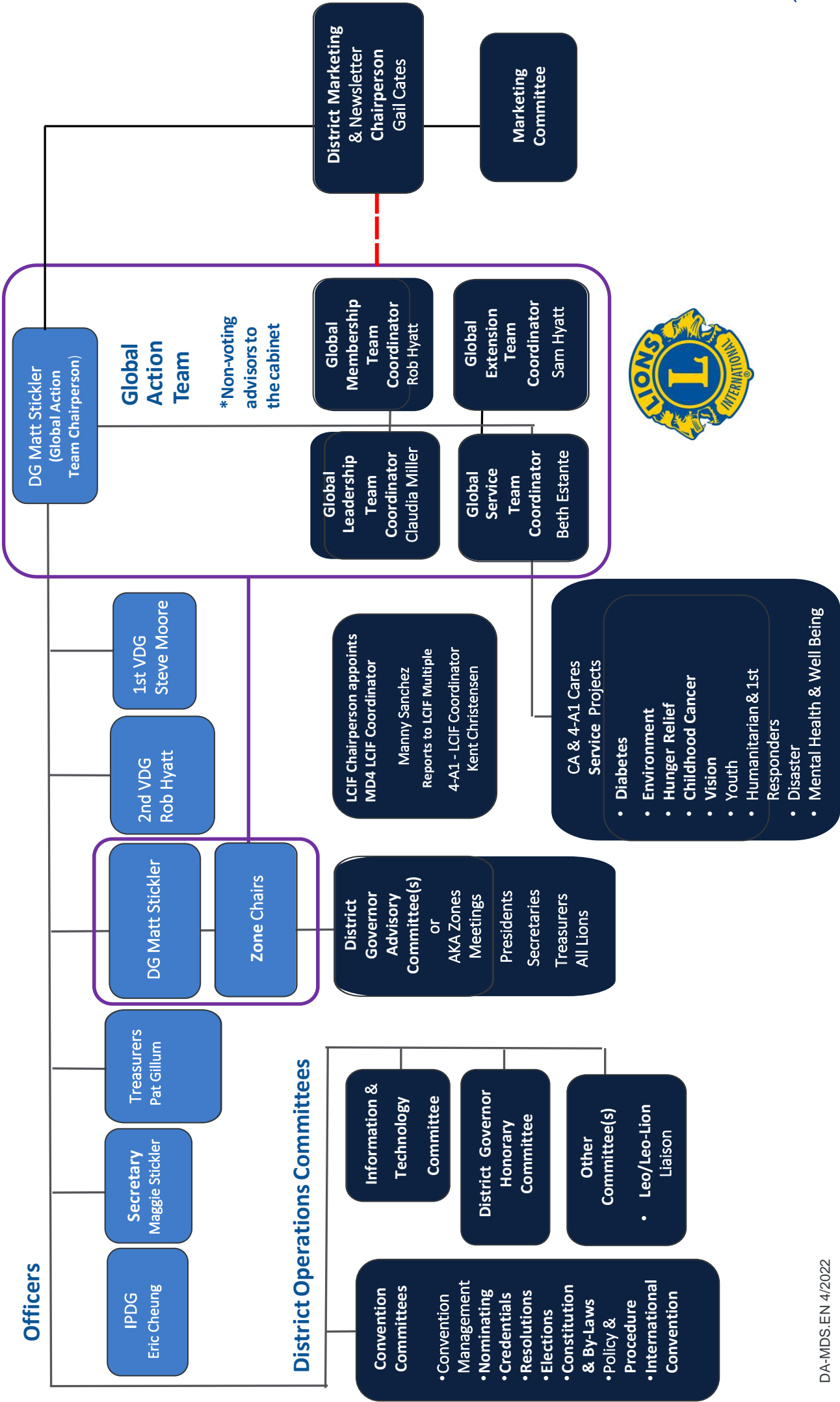
If you don’t follow through after the conversation, you lose all credibility and aren’t actually taking ownership. Ensure that the solutions provided are executed.



EXTREME OWNERSHIP FRAMEWORK COURSE

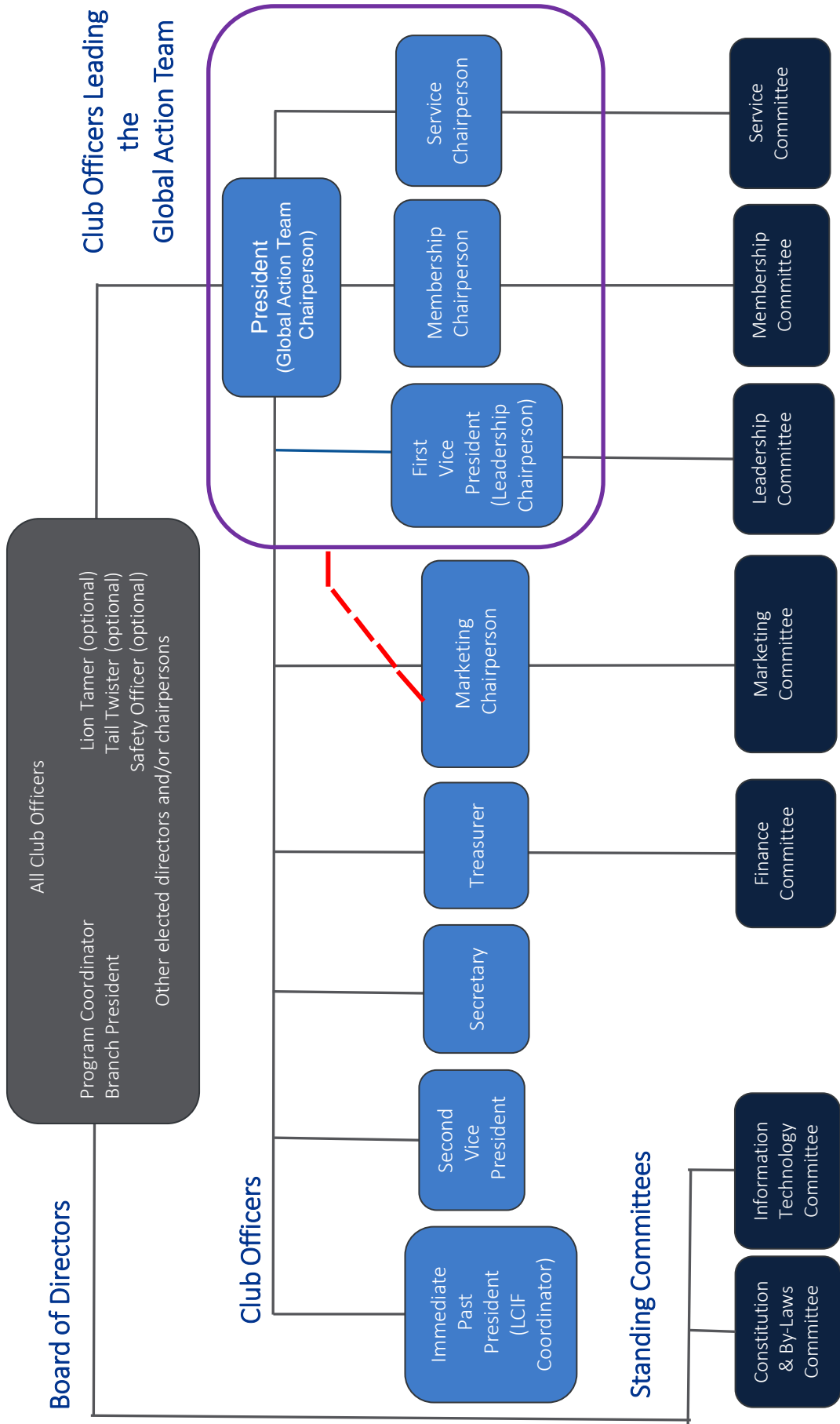


# District 4-A1 Cabinet Structure





# Standard Club Structure

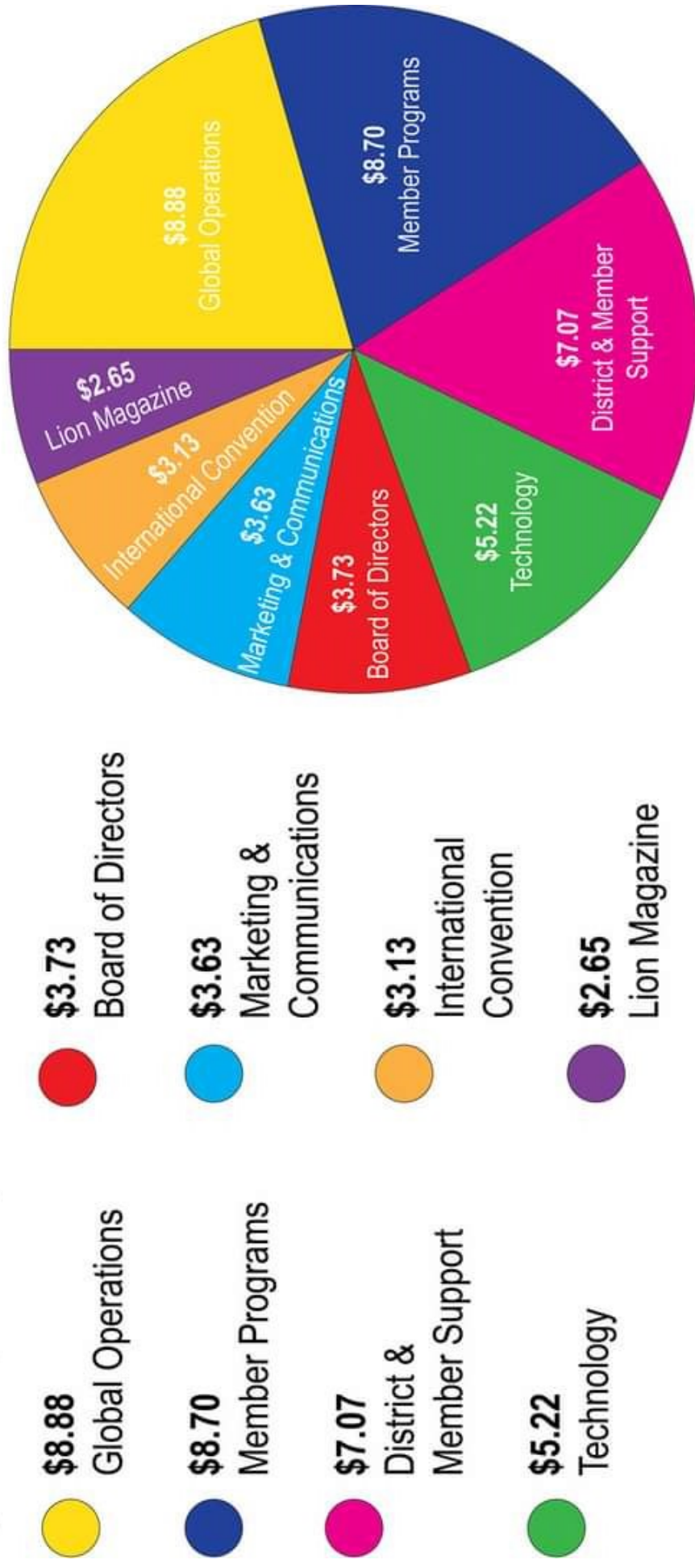






# Supporting the Association - How Your Dues Are Used

5-year average of how your US\$43 annual dues were used fiscal 2019-2023





# Lions International Membership Dues and Fees Chart - July 1, 2025

**All New Clubs, Club Branches, and Membership Applications must be submitted to Lions International through the Lion Portal.**

- Submit payment online or mail check, money order, wire transfer or deposit slip to Lions International.

## Membership Dues and Fees Chart

Member Type	Charter Fee	International Dues	Certification Required
Charter Member	US\$35	US\$50	–
Transfer Charter Member (Within one year of transfer)	US\$20	US\$50	–
Family Member (Excluding head of household)	US\$35	US\$25	TK-21a
Leo-Lion Member	US\$0	US\$25	LL-2
Young Adult Member (In a Leo-Lion Club only)	US\$0	US\$25	–
Branch Conversion Member (Members of the branch only)	US\$0	US\$50	CB-21
Join Together	US\$300 per club	US\$50	TK-38D_JT
Branch Transfer Charter Member	US\$20	US\$50	–
Student Member (Between the age of legal majority and through age 30)	US\$0	US\$25*	STU-5
Student Over Age 30 Member (In a campus club only)	US\$10	US\$50	STU-5

*\* Campus Lions club & clubs with a majority students must include one-year prepaid half international dues for each student.*

**Complete the following certification forms if applicable:**

- Student Member Certification Worksheet (STU5)
- Leo to Lions Certification and Years of Service Transfer Form (LL-2)
- Club Branch Conversion Form (CB21)
- Family Membership Form (TK-21a)
- Join Together Membership Certification Form (TK-38D\_JT)

## Online Statements

Are you registered online yet?

LCI payment options are available online! Now you can go green and opt out of receiving mailed statements.

[View Online Statements or Club Payments](#)

The online statement and payment options are being updated to better serve you. These features will allow you to:

- Go Green! Help the environment by choosing to receive club statements electronically. Choose to stop receiving mailed statements.
- View your club statements online, including the past two terms.
- Pay online with credit cards for on time payments.
- View your Semi-Annual Membership Dues invoices online.
- Review your online monthly statements for payment and membership updates.

How will this new feature affect your club and the Association?

- View your statement online and avoid postal delays.
- Pay your total statement balance timely and protect your club's Good Standing Status.
- Receive an email confirmation of your online payment.
- Check the Opt-Out option for this feature, and remain paperless for the duration determined by the club.

We are so excited to provide this service to you and trust you will use this feature to ensure your balances and membership status is accurate. Contact us should you have questions on how to use this service. We can be reached at: [membershipbilling@lionsclubs.org](mailto:membershipbilling@lionsclubs.org). Help us protect your security and do not include credit card details in any written correspondence.

Best regards,

Melinda Plott

Manager of Accounts Receivable and Club Account Services

Accounts Receivable and Club Account Services

300 W. 22nd Street

Oak Brook, IL 60523

TEL: 630-203-3820

630-203-3810

[membershipbilling@lionsclubs.org](mailto:membershipbilling@lionsclubs.org)

## FAQ

Q: Am I required to change the manner in which regular payments are sent?

A: No, it is not mandatory to pay online. This is an option offered to all club treasurers.

Q: Can I view payments not issued online?

A: Yes, non-online payments will be rejected online.

Q: When can I view my online statement?

A: Your online statement can be viewed after the 3rd or 4th business day following month-end close.

Q: Can District and Multiple District Statements be viewed and paid online?

A: District and Multiple District Statements are not yet available online at this time.

Q: How do I pay online?

A: Visit [www.lionsclubs.org](http://www.lionsclubs.org). Click the "MyLCI/Submit reports link, after logging in, click CLUB, STATEMENT followed by PAY NOW. You may pay by Visa, MasterCard, Discover and American Express credit. Debit cards are accepted.

Q: How do I go green and discontinue receiving mailed statements?

A: The Club Treasurer can designate the club as opting out of receiving paper statements by visiting [www.lionsclubs.org](http://www.lionsclubs.org); Click the MyLCI/Submit reports link and after logging in, check "opt out mailed statements and dues billing during that term.

Q: Can my club change the opt out option in future years?

A: Yes, the club can receive paper statements after opting out; however, only the club treasurer can change this option by checking "opt in to receive mailed statements and the membership dues invoice.

Q: Why should I opt out of receiving mailed statements?

A: You can avoid postal delays, help the environment, and lower postage costs.

Q: Will a statement be mailed if I have a zero balance or less?

A: You will not receive a mailed statement if your balance is zero or less, however, your statement can be viewed online regardless of the balance.

## Insurance

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The International Association of Lions Clubs has a program of Commercial General Liability Insurance that covers Lions on a worldwide basis. All Clubs and Districts are automatically insured. Through the link below you can produce your own Certificates of Insurance which provide evidence of the automatic coverage provided. You can also view the General Liability Program Summary which describes the automatic coverage afforded, including who is insured by this coverage as well as some coverage basics and exclusions. You can also access a Self-Inspection Checklist which is available for your use when conducting various fundraising activities.

- [Certificates of Insurance](#)
- [General Liability Insurance - Program Booklet](#) (Revised October 2024)
- [Self-Inspection Checklist](#) (Revised September 2007)

In addition to the automatic coverage mentioned above, Lions Clubs International now offers Supplemental Insurance Coverage for Clubs and Districts in the United States including Directors & Officers Liability, Crime / Fidelity, Additional Liability Insurance and Accident Insurance. You can get more information about this program and apply for coverage through the following link:

- Lions Club and District [Supplemental Insurance Program](#) (United States/English only)
- [Directors and Officers Liability Insurance](#)
- [Additional Liability Insurance](#)
- [Accident Insurance](#)

For questions please contact DSP Insurance Services, Inc. at (847) 934-6100 or (800) 316-6705.

### Additional Liability Insurance

Available in United States/English only.

This coverage offers limits of insurance in addition to the \$1,000,000 of coverage automatically provided by Lions Clubs International through the Global General Liability program. If you need a certificate of insurance evidencing coverage under the Global General Liability Program select the link titled "Certificate of Insurance" found below. If you need limits in addition to the automatic \$1,000,000 of coverage please review the "Additional Liability Insurance" coverage description via the below link.

- [Certificate of Insurance](#)
- [Additional Liability Insurance](#)

### Liquor Liability

Liquor Liability coverage can only be purchased along with the Additional Liability Insurance as outlined above. Minimum premiums for the Additional Liability Insurance and Liquor Liability combined will be at least \$800. If you are only looking for Liquor Liability coverage you should contact a local agent who should be able to arrange for a more competitive liquor policy. If you have questions about this coverage or would like an application, contact DSP Insurance Services, Inc. at (847) 934-6100 or (800) 316-6705.

# TAX COMPLIANCE

**All Clubs MUST file both IRS and FTB taxes.**

**ALL Clubs are to file as a 501(C)4 Corporation.**

## STATE OF CALIFORNIA

### TAX ISSUES AND REGULATIONS AFFECTING LIONS CLUBS AND LEADERSHIP

#### CHECKLIST:

1. When your Club was Chartered, you should have been issued an Internal Revenue Service Employer Identification Number. With this number, you will be required to file annual tax statements, with the California Franchise Tax Board, following the close of each Lions Year.

<https://www.irs.gov/charities-non-profits/annual-reporting-and-filing>

2. Most Counties in the State of California require Nonprofit Corporations to file a Fictitious Business Name FBN. This is filed with the County Recorder in the area where your Club is located or receives its mail if there is no physical location. This filing is good for five (5) years and then must be renewed and re-published. (This can be filed in person and returned the same day.)

Sample: San Diego County <https://arcc.sdcountry.ca.gov/Documents/CC230.pdf>

3. After the FBN has been filed and stamped, you are then required to publish this in a local newspaper and run it for four (4) weeks. (Proof of Publication will be sent to you at the end of the four (4) weeks.)

Sample: San Diego County <https://arcc.sdcountry.ca.gov/Documents/H115.pdf>

4. Next, as a District or a Club, you must file Articles of Incorporation with the California Secretary of State, as an IRS 501(c)(4) nonprofit corporation. (This will take approximately 3-4 months to process and be returned to you.)

<http://bpd.cdn.sos.ca.gov/corp/pdf/articles/arts-mu.pdf>

5. After the Articles of Incorporation have been filed, stamped and returned to you, they will include your California Identification Number. With this number, you will be required to file annual tax statements, with the California Franchise Tax Board, following the close of each Lions Year.

<https://www.ftb.ca.gov/businesses/Exempt-organizations/Filing-Requirements.shtml>

6. Within four weeks of receiving your filed, stamped and returned Articles of Incorporation, you will be required to file a Form SI-500, Statement of Information, with the California Secretary of State. This form lists your current year's officers and primary contact for service of legal documents and a Form SI-100, must be filed each year following your Election of Officers. (NOTE: If your Club's Officers are elected for two year terms, you would file this every other year.) (This can be filed on-line with a stamped copy returned to an email address normally within 24 hours. If filing by mail, this usually takes 2-4 weeks and then it will be returned to you.)

[http://bpd.cdn.sos.ca.gov/corp/pdf/so/corp\\_so550.pdf](http://bpd.cdn.sos.ca.gov/corp/pdf/so/corp_so550.pdf) [http://bpd.cdn.sos.ca.gov/corp/pdf/so/corp\\_so100.pdf](http://bpd.cdn.sos.ca.gov/corp/pdf/so/corp_so100.pdf)

7. Next, as a District or a Club, you must file a Form 3500 or 3500A, Application for Exemption, with the California Franchise Tax Board. You will be attaching a copy of your Internal Revenue Service Letter issuing your District or Club its Federal Employer Identification Number, a copy of the filed/stamped Fictitious Business Name, a copy of the filed/stamped Articles of Incorporation, a copy of the Lions Clubs International Letters of Exempt Status and a copy of your District or Club's By-laws. (The processing time for this is usually 3-4 months.)

[https://www.ftb.ca.gov/businesses/Exempt-organizations/Applying\\_for\\_tax-exemption.shtml#Submission-Exempt-Request](https://www.ftb.ca.gov/businesses/Exempt-organizations/Applying_for_tax-exemption.shtml#Submission-Exempt-Request)

8. Once you have received your approved Letter of Exempt Status from the California Franchise Tax Board, you are required to file an Initial Registration Form CT-1 with the State of California, Department of Justice/Attorney General's Registry of Charitable Trusts. This form is required to be filed by all charities in the State of California. You will be attaching a copy of your Internal Revenue Service Letter issuing your District or Club Federal Employer Identification Number, a copy of the filed/stamped Fictitious Business Name, a copy of the file/stamped Articles of Incorporation, a copy of your California Franchise Tax Board Letter of Exempt Status, a copy of the Lions Clubs International Letters of Exempt Status and a copy of your District or Club's By-laws. (The processing time for this is usually 2-4 weeks.)

<https://www.oag.ca.gov/sites/all/files/agweb/pdfs/charities/charitable/ct1-form.pdf>

9. Annually, you will be required to file a Renewal Report Form RRF- 1, with the State of California, Department of Justice/Attorney General's Office. This is a Disclosure Reporting form for use by every public benefit corporation and is required registration with the Attorney General's Registry of Charitable Trusts.

[https://www.oag.ca.gov/sites/all/files/agweb/pdfs/charities/charitable/rrf\\_1\\_form.pdf](https://www.oag.ca.gov/sites/all/files/agweb/pdfs/charities/charitable/rrf_1_form.pdf)

10. Specific questions relative to fundraising activities, raffles and 50/50 drawings is available at:

<https://www.oag.ca.gov/charities>

The fees for each of these document/application filings is disclosed within each link.

Information provided by MD4 Lions Clubs



**Who are the club officers that can report an activity or membership changes?**

**For Lions clubs:**

- Club President
- Club Secretary
- Club Administrator &
- Club Service Chairperson

**For Leo clubs:**

- Leo Club President
- Leo Club Secretary
- Leo Club Advisor

**Only the Club Secretary, Club Administrator and the District Administrator can make changes to membership.**

**Your District Administrator can:**

- **report service on behalf of clubs**
- **report officers and changes**
- **add, edit, and delete members**
- **input officers (PU-101).**

## **Club President Task List**

### **Tasks Prior to Taking Office July 1**

1. Appoint standing committee chairs and committees as determined by your Club
2. Meet with the Club Secretary, Club Treasurer, and Vice Presidents to establish communication systems, set meeting times, and reporting.
3. Meet with committee chairs to discuss expectations and goals.
  - a. Administrative Committees
  - b. Service / Activities Committees
  - c. Membership Committee

### **Monthly Tasks**

1. Preside at all club and board meetings
2. Encourage and participate in service activities
3. Review emails and information from LCI and District officers.
4. Share information with Board and membership
5. Encourage recruiting new members
6. Review MMR and Service Activity reporting on MyLCI and MyLION

### **Quarterly Tasks**

1. Attend Zone Meetings with Secretary
2. Attend District Meetings and Convention when possible
3. Share information learned from Zone and District meetings
4. Participate in District service projects (when possible)

### **Semi-Annual Tasks**

1. Review dues invoice from LCI and MD4 with Treasurer and Secretary
2. Assist Secretary and Treasurer in collection of dues as needed
3. Review Club Constitution and Bylaws with Board or Committee in July after LCI Convention and update as necessary
4. Share changes effecting Club after LCI Convention with Board and membership (July)

### **As Needed**

1. Call special meetings of the Club and Board
2. Induct new members or arrange for a District officer to do so
3. Order LCI Club supplies and materials or request Club Secretary to do so
4. Meet with Committee Chairs and Committees
5. Recognize citizens and members

6. Enter Student Speakers Contest information on MD4 website or delegate to appropriate member
7. Determine if Club is participating in Peace Poster / Essay Contest and obtain packet from LCI or delegate to appropriate member
8. Handle conflicts and concerns of members and officers

### **Annual Tasks**

1. Ensure regular elections are duly called, noticed, and held in a timely manner. The President appoints a Nominating Committee.
  - a. The Nominating Committee submits the names of the candidates for club officers to the club at the nomination meeting.
  - b. The nomination meeting is held in March. Club members must be informed of the meeting at least 14 days in advance.
  - c. An election meeting needs to take place in April. Notice of the meeting should be sent to club members 14 days in advance and should include the names of all approved nominees.
2. Ensure that new officers are submitted by May 15 in MyLCI
3. Prepare annual recognition and awards for Club members and work with Secretary to order various awards as needed
4. Request Club Secretary to order the Student Speakers Contest packet by October 1

### **Transition**

1. Meet with incoming President
2. Prepare for installation of new officers and celebration of the year
  - a. Recognition and awards for officers and members
  - b. Hand over gavel and other items as is Clubs tradition

## **Club Secretary & Treasurer Task Calendar**

### **Monthly Tasks**

1. Monthly Membership Reporting
  - a. Update changes when they happen
  - b. Drop deceased members
  - c. Add new members
  - d. Transfer members as requested
2. Monthly Club Service Activity Report
  - a. Report service activities as they happen (it's easier than doing it once a month)
  - b. Give yourself a cutoff date for the month and add the remainder the next month (Be kind to yourself)
3. Member Records (update as occurs)
4. Club Board of Directors and Special Meeting Minutes
5. Respond and send out any letter correspondence
6. Share information, fliers, and pertinent information with members (training opportunities, events, meetings, etc.)
7. Report to Board Financial Report (reconcile bank statements with books and prepare financial report – Club may have different reporting frequency. Board should see bank statements for transparency and accountability)

### **Quarterly Tasks**

1. Distribute information about Zone and District Meetings
2. Attend Zone Meeting
3. Share information from Zone Meeting with members
4. Report to President and Board any delinquency issues and actions taken to collect funds due to Club

### **Semi-Annual Tasks**

1. Review membership list and confirm it is accurate prior to end of cycle (December 30 and June 29) with Board
2. Treasurer provides a copy of LCI Dues invoice (January and July) and District invoice to Board
3. Secretary & Treasurer work together and issue semi-annual and/or monthly dues statements to each member and reconcile other financial obligations owed to Club. This information is shared with the Board of Directors.
4. Treasurer provides Board with a copy of monthly invoice from LCI

## **As Needed**

1. Review completed new membership applications
2. confirm information with new member
3. add members in Lion Portal
4. file application in Club records
5. Order Club supplies and awards through LCI or local vendor
6. Distribute information about LI, MD4, District Training to membership

## **After Annual Election**

1. Submit Club Officer Report in Lion Portal [**Due by May15**] (PU101 & Officers, Next Year)
2. Receive and distribute information about MD4, District and International Convention elections and changes in Constitution and Bylaws and other information
3. Apply to Lions International and District for member's and Club awards
4. Check records for 100% attendance and years of service awards (some clubs do attendance others don't)

## **Annual Tasks**

1. Ensure the reporting of Tax and Information filings to California Secretary of State, Attorney General Office, Franchise Tax Board, and IRS. President, Secretary and Treasurer to review and assist with filings. Filings are reported to Board of Directors prior to submitting to Federal and State Offices.
2. President, Secretary and Treasurer work together to submit Raffle application January 1 and final report December 31.
3. Order MD4 Student Speakers Contest packet by October 1 (MD4Lions.org)
4. Order LCI Peace Poster/Essay Contest Kit January 15
5. **Time Sensitive Dates**
  - Peace Poster LCI website (January 15th – October 1st )
  - Student Speaker MD4 website (May until October 1<sup>st</sup> for free / packets are mailed in October)
  - Your club members will vote on the new officers in April (or earlier)
  - Your secretary enters all officers for the next term in Lion Portal prior to May 15 and completes the online PU 101 form

## **Transition**

1. Pull attendance record for coming year from Lion Portal
2. Prepare annual report of activities, donations, hours, etc. for year-end banquet/installation event.
3. Confirm all Club files and records are up to date and ready for transfer to new president, secretary and/or treasurer.
4. Meet with incoming Club Secretary and/or Treasurer and review records and outstanding issues (share your tricks, systems and how to use the Lion Portal)

## **Suggestions and Thoughts From Club Secretaries & Treasurers**

Organization is key. Keep a binder or folder with any fliers or notices because someone is always asking the Secretary for dates and details and Treasurer for information .

- It's good to have Board Meeting notes and minutes on hand to refer to in case there is a question during a meeting.
- Treasurer should have financial report, bank statements, invoices and bills for Board review.
- Go to member resources, Lions Portal and get familiar with the tools and the ins and outs of the reports, and reporting data required for members and service activities.
- Don't wait until the end of the month to try and update everything. Set aside time once a week or a couple times a month to prepare reports, update activities, membership changes and additions, etc. It's much less of a burden and headache if you do.
- Be adventuresome and investigate Lions International website and the Lion Portal. It took me 3 years to find out that you can print off a monthly Club checklist for attendance.
- Learn how to save reports to a folder on your laptop or computer desktop. Then you can easily get to them whenever you need to.
- If you have to walk away from what you are doing, log-out.
- Enter activities and service as you go. It is so much easier.
- Reports are due before the last day of the month. Don't wait till 11:30PM to enter your reports. If you have a problem you may not be able to complete your report on time.

## **New Comments and Suggestions**

## **WHAT IS THE CLUB ADMIN OR ADMINISTRATOR?**

An appointed non-officer Lion in the club with the same MyLion access as the President and Secretary, that can assist the President or Secretary with tech issues.

They can load, edit, and drop members, enter service into Lion Portal, order supplies from LI and monitor the financial issues from LI.

This is a position that all clubs can have and should have if the Officers need help with dealing with Lion Portal.

It can be created by the President or Secretary adding the name to the officer/chair list in Lion Portal.

## **The 2025-2026 Contest Together As One**

When we come together, we can do amazing things. This year, we're inviting students around the world to envision what can happen when a diverse group of people unites around a common cause or goal. Imagine a world where we all come together as one!

### **Peace Poster Contest Deadlines**

Students ages 11, 12 or 13 as of November 15 are eligible to participate in the International Peace Poster Contest. Entries not meeting the following deadlines will be disqualified.

- **January 15:** Kits go on sale from the Club Supplies Sales Department at International Headquarters.
- **October 1:** Deadline to purchase kits from the Club Supplies Sales Department at International Headquarters.
- **November 15:** Postmark deadline for a club to send one winning poster (per contest sponsored) to the district governor.
- **December 1:** Postmark deadline for a district governor to send one winning district poster to multiple district council chairperson.
- **December 1:** Postmark deadline for a district governor not belonging to a multiple district to send one winning poster to the Brand & Creative Department at International Headquarters.
- **December 1:** Postmark deadline for a club not belonging to a district to send one winning entry to the Brand & Creative Department at International Headquarters.
- **December 15:** Postmark deadline for the multiple district council chairperson to send one winning poster to the Brand & Creative Department at International Headquarters.
- **February 1:** International winners notified on or before this date.

### **Order a Peace Poster Contest Kit**

To sponsor the Peace Poster Contest, Lions clubs can order a contest kit from January 15 to October 1. The kit is available in 12 of our official languages. A kit is needed for each contest sponsored.

**Now available:** Digital Peace Poster Kit. Get immediate access to all kit components via email, and download and print the digital kit to save



shipping fees.

### **Digital kit**

Each kit contains:

- Downloadable Official Club Contest Guide and Rules
- Downloadable Official School or Youth Group Contest Guide and Rules
- Downloadable participant flyer to print and give to participating students to take home
- Downloadable sticker to place on back of winning poster
- Digital certificates to print for contest winner and school or youth group

[Order digital kit](#)

### **Physical kit**

Each kit contains:

- Official Club Contest Guide and Rules
- Official School or Youth Group Contest Guide and Rules
- Participant flyer to duplicate and give to participating students to take home
- Sticker to place on back of winning poster
- Certificates for contest winner and school or youth group

[Order physical kit](#)

Link

<https://www.lionsclubs.org/en/start-our-approach/youth/peace-poster#deadlines>





# Club President and First Vice President

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e-Book



**Lions  
International**

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## **Welcome to the Club President and Vice President e-Book!**

This guide is designed to support you through two terms of service; not only as club president, but as club first vice president.

This e-Book contains tools and resources to be successful not only in your individual role as you serve, but also as the leader of a cohesive team of fellow club members and officers.

It's easy to navigate the e-Book. Just click on the topic headings contained in the Table of Contents. From there, you may click on hyperlinks that will take you directly to tools, resources and documents that make your job easier.

### **Club First Vice President**

#### **Prepare to Lead as Club First Vice President; Prepare to Succeed as Club President**

While serving as a first vice president, you will complete training and prepare to lead your club as president. As club president, you will implement the plan of your club leaders. You will help execute their plans for service, membership growth and communicating your club's service to your community.

As the club vice president, your tasks are two-fold. One of your top priorities is to stand ready to fulfill the duties of the club president if the president is unable to do so for any reason. Most likely, you will also have other duties as assigned by the president and may be asked to lead one or more committees during the year.

In addition to those duties, you should dedicate time preparing to serve as club president. It is important to understand the role of club president and all of its responsibilities well before you begin to serve.

#### **Self-study Training for Club President**

If you have not served as a club vice president or president, it is good to spend some time in the self-study online training module.

Log in to the [Lions Learning Center](#) located within Learn, with your Lion Account, to access online club officer courses which review key aspects of your role and responsibilities.

Club Officer Training – this module delivers an introductory overview of club officer roles and responsibilities and club structure.

Club President Responsibilities – This module provides basic information and resources necessary to prepare for the club president position:

- Appointing chairpersons.
- Planning and conducting meetings.
- Preparing to actively participate in zone meetings (District Governor’s Advisory Committee).
- Managing club elections and leadership succession.
- A module on Robert’s Rules of Order.

### **Become Familiar with Your Club Constitution and By-Laws**

Your club constitution and by-laws provide the basic structure and policies to guide your club’s operations and to meet the obligations of a club chartered with the International Association of Lions Clubs. It also serves as your club’s main reference document if there are questions about appropriate procedures to conduct club business.

[Standard Club Constitution and By-Laws](#) – This template document serves as the basis for a club to create its own governing document in accordance with the International Constitution and By-Laws. If your club does not have its own, use this standard document.

### **The Club Board of Directors**

Look at the [Standard Club Structure](#).

To be a successful club president, you will need to empower your leadership team; the club board of directors. Each board member fills a specific leadership role designed to ensure the successful operation of your club providing needed service to the community. By understanding the roles and responsibilities of each member of the club board, you can help ensure that the skills of the member match the job you are asking them to do. It also ensures that no one officer is burdened beyond their willingness and capability to succeed.

Review the officer duties in the [Standard Form Constitution & By-Laws](#) for these positions to match the skills and willingness of potential leaders with the tasks of the officers’ roles. Doing so will increase the likelihood that serving as a leader of the club will be a positive experience for each member on your team. There are customized web pages on the Lions International website that provide specific guidance as noted for the officers list below.

[Club President](#) – The club president is the chief executive officer of the club. He/she presides over meetings and calls the club to action to fulfill its program of service works; coordinating the efforts of board members and chairpersons to implement all activities of the club in both fellowship and service.

Club First Vice President – The club first vice president not only serves as a leader ready to step in for the president, but as a catalyst to annually assess club activities and then implement new goals in the next fiscal year as club president.

Club Second Vice President – The club second vice president also stands ready to be in succession and serves as requested by the club president to lead specific committees or projects.

[Club Secretary](#) - The club secretary keeps the history of the club's official proceedings, an accurate accounting of the club membership roster and assists in every communication effort to members. This board member serves as the communications liaison between club, district and association.

[Club Treasurer](#) – The club treasurer serves as the main bookkeeper for the club's financial accounts; both administrative and public funds (service activities). This includes the administration of membership dues invoicing and collection, making deposits and recording expense receipts. The treasurer prepares, distributes and retains all financial reports and records.

[Club Membership Chairperson](#) – The club membership chairperson leads the charge in recruiting new members, orienting them into involvement opportunities with the club and nurturing relationships between established members and new members.

[Club Service Chairperson](#) – The club service chairperson coordinates the service activities chosen by the club and reports the results of those activities to the association. Service reporting can optionally be delegated to the club president or secretary.

[Club Marketing Chairperson](#) – The club marketing chairperson keeps all the activities of a club in the public eye and promotes the club and its service to the community.

Immediate Past Club President – This officer serves as a welcoming host for all new prospective members and greets members and visitors at each meeting.

Club Branch Liaison – If your club has a [club branch](#), it is your obligation to appoint a club branch liaison to support the branch activities and keep parent club leaders informed.

[Leo Advisor](#) – To provide effective guidance, sponsoring Lions clubs appoint a Lion to serve as the Leo club advisor. This Lion should be someone who enjoys working with youth and engaging others in service.

[LCIF Club Coordinator](#) – This position educates club members of the many projects provided by LCIF and encourages members to become involved and directly support the efforts of LCIF.

Lion Tamer (optional) – This position takes care of the club paraphernalia and assists to prepare for each meeting as a sergeant-at-arms.

Lion Tail Twister (optional) – This position promotes the fun and good fellowship at meetings.



## Move Your Club Forward Each Year with a Plan

As club first vice president, one of your most important tasks is to lead your club forward into the next fiscal year and explore yet unrealized potential, after your club members review together its activities and accomplishments. There are several tools designed to assist your club, no matter how simple or sophisticated your operation.

[Club Quality Initiative](#) - Change is critical for each club. This is a strategic planning tool that helps clubs identify opportunities for improvement. By understanding your current operations, identifying areas that can be improved and taking measured steps to accomplish your goals, your club can be even better. The CQI program offers you [three suggested ideas](#) for implementing the Club Quality Initiative.

Plan for Your Club's Success (Global Membership Approach) [Webpage](#) – This webpage has been designed to assist clubs in attracting new members, overcome challenges, and develop new goals and strategies. Clubs can use this [planning guide](#) and [PowerPoint](#) to discover their strengths, ways to improve and new opportunities that will help them grow and thrive! Planning forms help develop a vision, assess your club's needs and organize your plan for a successful implementation.

Build Your Membership Plan - Using the [Global Membership Approach](#) helps you ensure success: The process developed will serve you in leading your club. The process is designed to not only grow your club...but to inspire new ideas, truly engage your membership (improving retention) and empower current and potential club leaders to lead. BUILD A TEAM, BUILD A VISION, BUILD A PLAN, BUILD SUCCESS!

[Your Club, Your Way!](#) - This resource offers ideas for ways that your club can customize your meetings for an enjoyable membership experience.

## Create Your Lion Account Login

The [Lion Portal](#) – allows you access to all Lions applications: Membership, Service, Insights, Learn, Shop and more.

To Log in or to register for the Lion Portal [click here](#)

- Service – Connect.Serve.Report! This site is where clubs report service, plan their service projects, connect with other Lions and create personal profiles. If you have further questions regarding service reporting, please email [lionssupport@lionsclubs.org](mailto:lionssupport@lionsclubs.org).
- Lion Portal – Tools for the Lion leaders! This site is where the club can manage their membership, create district and club profiles, check club voter eligibility, document and plan conventions as well as check new club charter application status. If you have further questions regarding the Lion Portal, please email [lionssupport@lionsclubs.org](mailto:lionssupport@lionsclubs.org).

- Insights – Comprehensive overview of Lions International in the areas of Membership, Service Activity, Donations and Club strength. Also featured is District Goals Progress and Learn.
- Learn – Provides Lions and Leos a central location to complete Lions Learning Center (LLC), located within Learn in the Lion Portal courses, search for Lions International-institutes (FDI and LCIP), view local trainings as reported by Multiple District and District GLT Coordinators and allows an individual Lion or Leo to access their “My Learning Record” report.
- Lions Shop –An easy way to order the most common club supplies and Lions International branded merchandise. Club presidents, secretaries or treasurers can login to their Shop account through the Member Portal and use club funds to purchase items. If you have further questions regarding club supplies, please email [orderdetails@lionsclubs.org](mailto:orderdetails@lionsclubs.org)

## **The First 30 Days as Club First Vice President**

### **Attend Club Officer Training Offered by Your District**

The training offered through your district is designed to assist your entire team of club leaders to be more effective as a leadership team and provides an opportunity for each officer to learn the basic skills of effective club operations.

### **Monthly Meetings and Events**

Club Meetings - If your club has a head table, you may be asked to sit by your club president during the club’s regular proceedings.

Board of Director Meetings - Your participation as an active member of the board is essential in your preparations to be club president and remain fully aware of club operations, programs and issues.

Service Activities - As a club leader, it is important to serve alongside your fellow members.

Assigned Committee Meetings - You may be heading up committees or standing in for the club president in some committee work.

### **Quarterly Meetings**

#### **Zone Meetings**

Zones consist of a group of 4 to 8 surrounding area clubs. The club officers from these clubs meet on a quarterly basis, usually during the first three quarters of the fiscal year, led by your zone chairperson. If you don’t know who your zone chairperson is, you can find this information by logging into the Lion Portal and clicking “my club” and on the club details page click “zone”. Once on this page, select “club officers”. Look there for your zone chairperson’s name and contact information.

[The Model District Governor Advisory Committee Meeting](#) – This guide assists both the zone chairperson and club officers in understanding what to expect at the quarterly zone meetings. Often times the zone chair asks a club to report regarding service, membership or other events. Each meeting may have a specific focus and provides an opportunity for club officers to meet and learn from each other.

## **Annual Events**

### **The Annual Club Business Meeting and Club Elections**

Elections are usually held at the beginning of the fourth quarter (April). Refer to the [Standard Club Constitution and By-Laws](#) for the provisions regarding elections.

The nominations committee will provide information for the names of those who have been nominated for officer and director positions. The secretary will then prepare ballots for elections as per policy. See “Exhibit B” in the [Standard Club Constitution and By-Laws](#).

By April 15, or directly after the club completes its elections, the club president or secretary may report officers and directors via the [Lion Portal](#) or via the Officers Reporting Form [PU101](#).

### **District/Multiple District Conventions**

If your district offers club officer training at its annual district convention, it is a good opportunity to receive direct local training and meet other incoming club presidents who will be serving in the same year as you.

### **Delegates for the International Convention**

Each club is entitled to participate in the election of International Officers by assigning club members to serve as voting delegates to the convention.

### **The Transition to Club President**

#### **Complete Strategic Planning and Make a Plan**

Once the club elections are complete and the directors and officers have been determined, you may begin to plan for the next fiscal year. If your club has not previously completed any type of planning exercise, the [Club Quality Initiative](#) and [Plan for Your Club’s Success](#) are a great place to start.

Be sure to assess previous projects, programs and processes.

Create a plan for club meetings, events, service activities and other opportunities offering wider involvement at the district level.

Delegate responsibilities specific to the duties of the club officers and chairpersons (membership, service and marketing) relevant to the club goals and activities.

Work with the incoming officers to finalize the club calendar so that it may be communicated in an effective and timely manner.

Assist the current club president with the transition process between the outgoing officers and the incoming officers.

You may want to also review the new [Club and Community Needs Assessment](#) to find the best ways for the club to support its community.

### **Your Role as Club President - Put the Club Plan in ACTION!**

If your club completed a basic set of goals of what it wants to accomplish for the next fiscal year, you have the task of pulling it together into an actionable plan that all club members can participate in.

### **Monthly Events**

#### **Club Meetings**

You may find yourself responsible for the programs, speakers and guests at the club meetings. You have a wonderful opportunity to foster fun and meaningful programs that members find worthy of their time. The club meeting is the time to focus on the great service the club is providing the communities it serves.

[Your Club, Your Way!](#) – This resource offers ideas for ways that your club can customize your meetings for an enjoyable membership experience.

[Hosting Lions International guests](#) – Your club may determine the level of protocol that you wish to follow for all visitors, including district governor and international guests. Be sure to communicate your club's traditions and level of formality when welcoming guests so that the guest understands what to expect when visiting your club.

[New Members Induction Ceremonies](#) – This guide contains suggested wording to induct new members into the club.

Prepare agendas - Work with your club secretary to organize, prepare and distribute the agenda for club meetings.

Lead the meetings – Be prepared to preside over meetings, and that may include diffusing differences of opinion and keeping the meeting on track with the agenda to make the best use of member's time.

Follow-up after the meetings – Complete any follow-up required after a meeting in a timely fashion.

## **Board of Directors Meetings**

The board of directors meetings focus on “working on the business” of the club: this includes both the business functions of the club, and the programs operations; member satisfaction, community service, and marketing communications.

Agendas – Be sure to set an expectation that all officers and chairpersons report on a monthly basis to ensure transparency of operations.

Minutes and committee reports – Communicate with the board members prior to board meetings to prepare proper report documentation in writing. This includes meeting minutes, program activities and all financial transactions on a monthly basis to ensure that the club members receive full disclosure of the club’s operations.

Follow-up – Keep the club in good standing by making sure that it meets all of its fiduciary, reporting and due diligence obligations to the association as well as any local governing body as required by local law.

## **Quarterly Meetings**

### **Zone Meetings**

Zones consist of a group of 4 to 8 surrounding area clubs. The club officers from these clubs meet on a quarterly basis, usually during the first three quarters of the fiscal year, led by your zone chairperson. If you don’t know who your zone chairperson is, you can find this information by logging into the Lion Portal and clicking “my club” and on the club details page click “zone”. Once on this page, select “club officers”. Look there for your zone chairperson’s name and contact information.

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## **Annual Events**

### **The Annual Club Business Meeting and Elections**

Elections are usually held at the beginning of the fourth quarter (April). Refer to the [Standard Club Constitution and By-Laws](#) for the provisions regarding elections.

As club president, you are responsible for the work of the nominations committee, preparations for the election documents with the assistance of the club secretary and managing the election process as per the policies and procedures outlined in your club constitution and by-laws.

The nominations committee will provide to the president the names of those who have been nominated for officer and director positions. The secretary will then prepare ballots for elections as per policy. See “Exhibit B” in the [Standard Club Constitution and By-Laws](#).

### **District/Multiple District Conventions**

You as club president serve as the leading representative of your club and should encourage your members to attend the district convention for education, sharing best practices with fellow Lions and the election of district officers. You may also be called upon to assist with several tasks associated with the district or multiple district conventions.

The district may contact the club leadership to confirm the club delegate list in preparation for the district conventions. The delegate formula is defined in [The International By-Laws, Article IX](#). Work with the club secretary to complete any requested registrations for district events, including advertising, hospitality rooms and convention attendees.

Check with the convention organizers for the opportunity to participate in the printed convention program ad pages or club reports.

Process documents and any local club endorsement requirements for members running for higher officer positions.

### **Constitutional Area-wide Events**

[Lions International Forums](#) – All Lions are invited to participate in the Constitutional Area where the Forum is held.

### **International Events**

[Lions International Calendar of Events](#) – This international headquarters calendar contains upcoming events and important award application deadlines along with information on global service initiatives.

### **Transitioning Out of Club President**

[Recognition and Celebrating Success](#) – At the conclusion of the fiscal year, it is a good time to honor those club leaders that have served as outstanding leaders of the club in its effort to reach its goals. Visit the Lions Shop in your Member Portal to see what is available.

[Club Excellence Award](#) – Clubs and districts that excel in community service, membership growth, communication and organizational management may qualify for the prestigious Excellence Award.

[Ceremony for Installation of Officers](#) – One of your final official acts as club president may be to install the new incoming officers for the next fiscal year.

## About Lions Clubs International Foundation

[Lions Clubs International Foundation \(LCIF\)](#) – Is the charitable arm of Lions Clubs International. LCIF's mission is to empower Lions clubs, volunteers, and partners to improve health and well-being, strengthen communities, and support those in need through humanitarian services and grants that impact lives globally, and encourage peace and international understanding.

Since 1968, LCIF has funded humanitarian service through donations from Lions Clubs International members; the general public; and partners. LCIF's funding model ensures 100% of donations support grants and programs.

As the only foundation to empower the service of Lions worldwide, LCIF has awarded more than 20,000 grants worldwide, totaling more than US\$1.2 billion. Among the many service projects made possible through LCIF funding, highlights include:

- Funding 9.7 million cataract surgeries
- Helping youth and educators in more than 110 countries through Lions Quest, the foundation's premier youth development and social and emotional learning program
- Providing more than US\$160 million for disaster relief and preparedness

For more than 50 years, LCIF has remained steadfast in its commitment to empowering Lions globally through their service. With every grant awarded, beneficiaries have opportunities to enjoy safer, healthier, and more productive lives.

Contact us: [lcif@lionsclubs.org](mailto:lcif@lionsclubs.org)

## LCIF Grants

LCIF offers a wide variety of grants to support Lions' service to their local communities and the world. For decades, LCIF has contributed to Lions' efforts in the focus areas of vision, disaster relief, youth and humanitarian causes. Visit the [LCIF Grants Toolkit](#) for more information.

- [Childhood Cancer Grants](#) help support and improve quality of life for children with cancer and their families.
- [Diabetes Grants](#) help reduce prevalence of diabetes and improve quality of life for those diagnosed.
- [Disaster Grants](#) offer a variety of funding options designed to support Lions-led relief efforts during the various stages of disaster relief operations, including:

- Emergency Grants help Lions provide immediate emergency assistance to victims of natural disasters.
  - Preparedness Grants support partnering with local authorities and organizations to prepare for future relief efforts.
  - Community Recovery Grants help support short-term clean-up and repair where immediate needs are already addressed by other organizations.
  - Major Catastrophe Grants provide support for relief efforts following natural disasters or civil calamities with significant international impact.
- [District and Club Community Impact Grants](#) fund local humanitarian projects on a club and/or district level.
  - [Hunger Grants](#) support Lions service projects focused on alleviating hunger and improving access to food resources.
  - [Leo Service Grants](#) support Leos in assessing, planning, and implementing their own service projects.
  - [Lions Quest Grants](#) support school and community based Social-Emotional Learning (SEL) programs for youth in grades Pre-K through 12.
    - Program Grants are implemented where Lions have detailed plans and commitments from local schools, or where programs are ready for expansion.
    - Promotional Grants assist districts in improving understanding of Lions Quest programming and communicating program value.
    - Community Partnership Grants start Lions Quest programs in new areas or reactivate dormant programs.
  - [Matching Grants](#) help establish or expand Lions-initiated projects addressing critical human and social needs.
  - [SightFirst Grants](#) support the development of comprehensive eye care systems through projects that focus on infrastructure development, human resource training, eye care service delivery and eye health education.

For a printable version of these descriptions, download [Supporting your Service: A Guide to LCIF Grant Opportunities](#).

Contact us: [LCIFGlobalGrants@lionsclubs.org](mailto:LCIFGlobalGrants@lionsclubs.org)



## Getting Started Locally

Many presentations and learning opportunities are available to prepare clubs, districts, and multiple districts in planning and implanting projects funded by LCIF. To facilitate education about LCIF grants:

- Speak with your LCIF district coordinator to learn more about LCIF's history of grants in your district.
- Learn more about identifying needs in your community, district resources, and the process of applying for a grant using [10 Tips: Applying for a LCIF Grant](#).

## Supporting LCIF

The grant funding mentioned above is only possible through continued support of LCIF from Lions, Leos, Lions clubs, partners and friends of the foundation. Every donation to LCIF makes a difference, no matter the amount, and every dollar donated transforms into life-changing service that brings hope to a world in need. Our world continues to need Lions. And Lions need funding from our global foundation to magnify the impact of their service.

## Recognition Programs

To honor and recognize our donors, LCIF has created a comprehensive recognition structure. Recognition varies by level of support and is available to individuals, clubs, districts, multiple districts, corporations and other contributing partners.

- [Presidential LCIF Supporter](#)
- [Melvin Jones and Progressive Melvin Jones Fellows](#)
- [Lead and Major Gift Recognition](#)
- [Lions Legacy Society](#)
- [Club Recognition](#)
- [District Recognition](#)
- [Memorial Donations](#)
- [In Honor Donations](#)
- [Corporate Recognition](#)

Learn more: <https://www.lionsclubs.org/en/give-how-to-give/recognition-programs>

Contact LCIF Development: [lcifdevelopment@lionsclubs.org](mailto:lcifdevelopment@lionsclubs.org)

Contact LCIF Donor Services: [donorassistance@lionsclubs.org](mailto:donorassistance@lionsclubs.org)

## **Club LCIF Coordinator**

Each club is to identify and appoint a club LCIF coordinator. The main responsibilities of the club LCIF coordinator are to:

- Raise funds. Implement fundraising strategies in support of LCIF, including through individual member donations, fundraising events, club treasury gifts, and donations from local non-Lions and businesses.
- Make a plan. Develop a specific set of activities for their club's support of LCIF in a given year.
- Tell the story of LCIF. Educate their club on the importance and impact of LCIF.
- Build a team. Invite other club members to join them in planning fundraising activities.
- Learn more about LCIF grants. Explore the District and Club Community Impact Grant program (see LCIF Grants section above) to learn how a percentage of unrestricted contributions to LCIF can be transformed into grants that fund local projects.

Club LCIF coordinators connect each individual club to the foundation, and help your district achieve its goals. You can work with your LCIF district coordinator to ensure that all clubs in your district have identified and appointed a coordinator who can fulfill this responsibility.

Every effort should be made to assign a club LCIF coordinator who is knowledgeable about the foundation and committed to raising awareness and supporting fundraising efforts. If no individual is assigned in MyLCI by August 1, the Immediate Past Club President will be automatically assigned. Clubs are allowed to reappoint the club LCIF coordinator who served the previous year, but the club must assign this role by August 1 to avoid an automatic replacement.

## **Responsibility and Privacy**

LCIF stewards donor funds with a focus on transparency, governance, leadership and results. LCIF is committed to its donors, who are integral to making Lions life-changing service possible. With 100% of donations going towards grants and programs, LCIF empowers the compassionate service of Lions and those who need our help.

Learn more: <https://www.lionsclubs.org/en/explore-our-foundation/responsibility-privacy>

## **Policies and Processes for Clubs**

### **Club Changes**

[Club Merger](#) – This process allows two clubs to merge together, resulting in a single charter.

[Club Name Change](#) – A Lions club may change its name according to board policy by completing and submitting this form.

### **Governing Documents and Policies**

[International Constitution and By-Laws](#) – The International Constitution and By-Laws contain sections that pertain specifically to the membership structure and operations of the club.

[Standard Club Constitution and By-Laws](#) – This is the standard template for a club that it may use to draft its own governing document.

[Board Policy Manual](#) – This document contains the policies of the International Board of Directors of the Association.

### **Keeping Your Club in Good Standing**

It is important for every club leader to understand the obligations of a club chartered with the association.

Good Standing Definition – This may be found in [The Board Policy Manual - Chapter V., Clubs](#) which fully explains the obligations of a club.

[Financial Suspension Policy](#) – It is important for a club to promptly pay its dues at all levels (district/multiple district/international). The Financial Suspension Policy applies specifically to non-payment of international dues.

[Club Reactivation Report](#) – Complete this form when reactivating your club from Status Quo with the approval of the District Governor, First vice District Governor and Zone Chairperson.

[Best Practices for Financial Transparency](#) – This brief guide covers the best practices of club accounting and reporting to club members.

## **Legalities and Technicalities**

[Use of Funds Guidelines](#) - This provides guidance on the appropriate use of public funds or administrative funds for clubs and districts.

[General Liability Insurance Program](#) – The International Association of Lions Clubs has a program of commercial general liability insurance that covers Lions on a worldwide basis. All Clubs and Districts are automatically insured.

[Certificates of Insurance](#) - In order to expedite the certificate issuance process, you now have the ability to create certificates of insurance on your own.

[Supplemental Insurance](#) - In addition to the automatic coverage mentioned above, Lions Clubs International now offers Supplemental Insurance Coverage for Clubs and Districts in the United States including Directors & Officers Liability, Crime / Fidelity, Additional Liability Insurance and Accident Insurance.

[Lions Trademark Overview](#) - This guideline is to help you understand the appropriate use of the Lions emblem and trademarks, and when approval is required.

[Lions Clubs International and Lions Clubs International Foundation Privacy Policy](#) - Lions Clubs International (LCI) and LCIF recognize the importance of protecting the private information of our members.

## **Amendments to Your Constitution and By-Laws**

From time to time, your club may choose to make amendments to your club constitution and by-laws. As club president, you will lead and manage this process. Check your own constitution and by-laws for the provisions regarding amendments to ensure that the process is completed according to policy. Your club secretary will assist you in making necessary draft amendments, communicating with the club members regarding the proposed changes and implementing the required processes to complete the amendments.

## **Promoting Harmony Among Lions**

### **Preventing and Resolving Disputes**

The purpose of Lions Dispute Resolution Procedures (DRP) is to provide a mechanism for resolving disputes within the Lions organization without the need for a formal evidentiary hearing. To achieve this goal, the International Board of Directors have adopted the rules of procedure for hearing complaints, disputes or claims arising from the International Constitution and By-Laws, International Board Policy or matters arising at the club or district (single, sub- and multiple) level. It is an obligation of membership to pursue all complaints, disputes or claims in accordance with the International Constitution and By-Laws and policies and procedures adopted by the International Board of Directors. Accordingly, the International Board of Directors have adopted the Club Dispute Resolution Procedure, District Dispute Resolution Procedure and the Multiple District Dispute Resolution Procedure as the acceptable DRP policies to resolve Lions issues at the club, district and multiple district levels.

[Dispute Resolution Guidelines](#) - The guidelines are intended to assist Lions members, clubs and districts (single, sub- and multiple) in following the Club, District and Multiple District Dispute Resolution Procedures when conflicts cannot be resolved through informal processes. These guides are a supplement to the policies adopted by the International Board of Directors and are not intended to replace the policies adopted by the International Board of Directors.

[Club Dispute Resolution Procedure](#) - This procedure is designed for use to resolve issues within a club.

[District Dispute Resolution Procedure](#) - This procedure is designed for issues between clubs or between club(s) and the district administration in relation to the district's constitution, by-laws and policies.

- [Multiple District Resolution Process](#) - This procedure is designed for disputes relative to issues between any clubs or sub-districts in the multiple district, or any club(s) or sub-district(s) and the multiple district administration.
- [Constitutional Complaints Procedures](#) - This procedure is used to resolve issues concerning the interpretation, breach of, or application of The International Association of Lions Clubs' Constitution and By-Laws or any International Board Policy.



District and Club Administration  
Lions Clubs International  
300 W. 22<sup>nd</sup> Street  
Oak Brook, IL 60523-8842 USA  
[www.lionsclubs.org](http://www.lionsclubs.org)  
Email: [clubofficers@lionsclubs.org](mailto:clubofficers@lionsclubs.org)  
Phone: (630) 468-6890



# Club Secretary

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e-Book



**Lions  
International**





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## **Welcome to the Club Secretary e-Book!**

This guide is designed to support you in your role as secretary for your club. It contains tools and resources for you to be successful not only in your individual role, but as a cohesive team member with your fellow club officers and members.

It's easy to navigate the e-Book. Just click on the various sections contained in the Table of Contents pertinent to the tasks you perform to fulfill your role. From there, you will find useful information and hyperlinks that take you directly to tools, resources and documents that make your job easier.

### **Leading Your Club**

If you spend some time studying, training and planning to fulfill the responsibilities of your position prior to the start of your term in office, you will better support the activities of your club. You and your fellow servant-leaders will more effectively work together to lead the club in realizing its vision and ensure it to be a success.

## **Prepare to Lead; Prepare to Succeed**

### **Start with Self-study for the Club Secretary Position**

If you are new to the position of club secretary, or just want to be sure that you have the most updated position description, tools and resources available, it is good to spend some time in the self-study online training module.

Log into the Lion Portal using your Lion Account credentials to access [Lions Learning Center](#) (located within Learn application) for online club officer courses which review key aspects of your role and responsibilities.

- **Club Officer Training** – this module delivers an introductory overview of club officer roles and responsibilities and club structure.
- **Club Secretary Responsibilities** – this module summarizes responsibilities, explains time lines and provides information and resources necessary to prepare for the club secretary position:

Maintain the club roster and report membership to Lions International

Prepare all documents, agendas for meetings and record minutes of all business proceedings

Keep files of all pertinent records

Manage club correspondence

Actively participate in zone meetings

Turn over all records to incoming secretary at conclusion of term of service

### **Become Familiar with Your Club Constitution and By-Laws**

Your club constitution and by-laws provide the basic structure and policies to guide your club's operations and to meet the obligations of a club chartered with the International Association of Lions Clubs. It also serves as your club's main reference document if there are questions about appropriate procedures to conduct club business.

[Standard Club Constitution and By-Laws](#) – This template document serves as the basis for a club to create its own governing document in accordance with the International Constitution and By-Laws. If your club does not have its own, use this standard document.

## Create Your Logon for the Member

The [Lion Portal](#)— allows you access to all Lions applications: Membership, Service, Insights, Learn Shop and more.

To Log in or to register for the Lion Portal [click here](#)

- Service – Connect.Serve.Report! This site is where clubs report service, plan their service projects, connect with other Lions and create personal profiles. If you have further questions regarding service reporting, please email [lionssupport@lionsclubs.org](mailto:lionssupport@lionsclubs.org).
- Lion Portal – Tools for the Lion leaders! This site is where the club can manage their membership, create district and club profiles, check club voter eligibility, document and plan conventions as well as check new club charter application status. If you have further questions regarding the Lion Portal, please email [lionssupport@lionsclubs.org](mailto:lionssupport@lionsclubs.org)
- Insights – Comprehensive overview of Lions International in the areas of Membership, Service Activity, Donations and Club strength. Also featured is District Goals Progress and Learn.
- Learn – Provides Lions and Leos a central location to complete Lions Learning Center (LLC), located within Learn in the Lion Portal courses, search for Lions International Institutes, (FDI and LCIP), view local trainings as reported by Multiple District and District GLT Coordinators and allows an individual Lion or Leo to access their “My Learning Record” report.
- Lions Shop – An easy way to order the most common club supplies and Lions International branded merchandise. Club presidents, secretaries or treasurers can login to their Shop account through the Member Portal and use club funds to purchase items. If you have further questions regarding club supplies, please email [orderdetails@lionsclubs.org](mailto:orderdetails@lionsclubs.org)

## Managing the Club Roster and Member Contact Information

One of your most important tasks is to maintain an accurate club roster of members. The Lion Portal serves as your main resource to ensure that the club roster is always an accurate listing, and that each member’s contact information is kept current.

In the Lion Portal, under the My Club Actions and then select View Report – Run the **Club Roster** report to see the current list of all of your club’s members.

Report Membership in the Lion Portal— Visit the FAQ and training videos located on your home page of the Lion Portal.

## Understanding Membership Types and Categories for Each Member of Your Club

The rights and obligations of each of your club members and their subsequent membership dues owed are based upon a combination of Membership Type and Membership Category, which affect the international and club-level dues.

[Membership Types and Categories](#) – This quick-reference guide explains the details of various membership programs available:

- **Membership types** – The association provides both regular membership and special discounted membership programs for families, college students, former Leos and young adults. These types determine international fees and dues levels billed to each Lion.
- **Membership categories** – There are several membership categories which provide various levels of involvement for regular club members to best fit their needs as volunteers. Local club dues may vary for these categories and those dues levels are provided for in the club's constitution and by-laws.

## Processing Newly Recruited Members

Your club membership chairperson will work closely with you when adding new members to your club. When a new member joins the club, the membership chairperson will assist the member in selecting the membership category that appropriately matches their chosen level of involvement with the club. In addition, it is important to be aware of the various membership types available through the association that provide a potential member a reduced level of international dues, including family membership, student membership and Leo to Lion membership.

[Membership Application](#) - This form may be emailed directly to a prospective new member. You may use the information from the form to add new members in the Lion Portal. Be sure to retain a copy of all new member applications with your official club documents and make a copy to give back to the prospective member.

## Member Contact Report for Communications

Located within the Lion Portal, the data export allows you to download member contact information, officer contact information and member detail information. This feature can be found under My Club – Data Export.

## Purchase Club Items Online at the Lions Shop

The [Lions Shop](#) is an easy way to order the most commonly used supplies and Lions International branded merchandise.

Here are some quick links to the most frequently requested items:

[Club Meeting Supplies](#) – This section of the club supplies online catalog contains gavels, gongs, meeting forms, and member name badges.

[New Member Kits](#) – The items contained in the New Member Kit welcome a Lion into the organization and recognizes the new member's sponsor as well. Club Presidents, Secretaries and Treasurers who are logged into the Lion Account may request New Member Kits online.

[Lions Apparel](#) – This area contains club vests, shirts, caps and other popular clothing items.

[Peace Poster Kit](#) – Please note that these kits are available for purchase only from January 15 through October 1 each year.

[Awards and Recognition](#) – This section contains a wide variety of plaques, medals, certificates, and other products to help you recognize outstanding Lions Clubs.

If you have further questions regarding club supplies, please email [orderdetails@lionsclubs.org](mailto:orderdetails@lionsclubs.org).

### **The First 30 Days in Your Position**

The beginning of the fiscal year is a crucial time for a secretary to complete many tasks. This includes maintaining the roster of the club and setting the calendar for events and projects. Another important task is to set up a system to retain business records; especially those that pertain to membership, committee reports, finances and record of decisions and actions taken by the club and board of directors.

### **Attend Club Officer Training Offered by Your District**

The training offered through your district is designed to assist your entire team of club leaders to be more effective as a leadership team and provides an opportunity for each officer to learn the basic skills of the most common tasks.

### **Review the Club Roster**

All dues invoices are based on the club roster as of June 30 and December 31. To ensure that your club is not held accountable for dues owed by members that are no longer in your club, review your roster before June 30 (with your outgoing club secretary) and then again before December 31. Here is a good way to review the roster:

[Log into the Lions Portal](#): In the Lion Portal, Select *My Club – Club Actions – View Reports* and select *club Roster of Membership Data Report* to ensure your club roster reflects those members who are still active.

In the Lion Portal, under the *My Club – Club Actions – View Reports* run the **Family Unit Report** to review family unit members to ensure accuracy.

Add any new members not yet reported to Lions International – use the [Membership Application](#) to collect new member contact information.

Prepare a list of members who may no longer be active in the club for the board to review for potential removal from the roster.

Make final roster adjustments in the Lion Portal prior to June 30 and December 31 to ensure dues will not be invoiced to the club for members no longer on the club roster. Be sure to confirm with the previous club secretary that all membership changes prior to June 30 have been recorded in the Lion Portal.

- Use the Lion Portal to print membership cards once dues have been received from members or [order membership cards](#) from the Member Service Center.

### **Update all Contact Information for Your Members**

Current contact information for your members helps to ensure good communication within the club. Use the Member Information Update Report in the Lion Portal to gather current contact information for all club members.

### **Establish the Club Calendar**

To keep the members engaged and foster meaningful involvement, the club calendar should be planned out well in advance and communicated continually to club members.

Assist the club president in preparing the club calendar for the next fiscal year.

Ensure that monthly club and board meeting dates are set. Review and update the club meeting location/time on the club's home page.

Create an annual event calendar readily available for the club members.

Check with district leaders for key events and deadline dates (conventions and district-level awards).

Prepare for the quarterly meetings of the District Governor Advisory Board (zone meetings).



Make note of the club meeting or event that includes the district governor annual club visit.

Make note of visits by other district leaders.

Be ready to assist with meeting logistics and making arrangements for club meeting space.

If necessary, maintain a calendar of district and multiple district events.

[Lions International Calendar of Events](#) – This online calendar provides important information and dates of major service, leadership and membership programs, initiatives and events, including the International Convention.

### **Monthly Tasks**

As secretary, you will complete a set of tasks on a monthly basis. You will be preparing for meetings, recording proceedings of those meetings and events, completing follow-up and organizing the retention of meeting documents. You will also be communicating with the international association and district on a monthly basis.

### **Prepare for Programs and Meetings**

[Your Club, Your Way!](#) – This guide will assist your club to define how it would like to have its meetings.

Invitations – You may be requested to send invitations to presenters or guests on behalf of your club.

Prepare club and board meeting agendas as requested by the club president.

Prepare reports and minutes for the previous month's meetings for distribution at club or board meetings as appropriate.

[Hosting Lions International guests](#) – Your club may determine the level of protocol that you wish to follow for all visitors, including district governor and international guests. Be sure to communicate your club's traditions and level of formality when welcoming guests so that the guest understands what to expect when visiting your club.

[New Members Induction Ceremonies](#) – This guide contains suggested wording to induct new members into the club.

**Maintain the Club Business Records** - for general membership, committee and board meetings.

Agendas and minutes should be retained after club meetings and board meetings.

Collect, distribute and retain committee reports for permanent meeting records.

Maintain full documentation of all key business operations, including minutes, agendas, committee reports, financial statements, elections and membership applications.

You may be asked to also retain and file financial documents or legal documents along with meeting minutes. Be aware of and prepared to keep financial or legal records.

Maintain necessary documentation for local taxing or registering bodies.

Maintain copies of all contracts and legal documents.

Obtain [insurance certificates](#) as required for activities.

### **Manage Correspondence**

As a general rule, Lions International and the district will send Lions-related correspondence and packages to the business address of the club secretary. You can update your business address at any time using the Lion Portal. Note: packages containing non-paper items and products (pins and awards) cannot be shipped to a post office box.

Prepare and assist with distribution of service and membership chevrons, etc. Awards are often provided to the club president for presentation.

Create minutes of board meetings and send a draft to club president for approval. After approval, forward the minutes to all members.

If not a task that is completed by the marketing chairperson, send the club newsletter to all members and key district cabinet members.

Utilize a sign-up sheet for visiting Lions or guests for the purpose of including the names in the minutes of each meeting.

At each meeting, record members who volunteer to participate in club and or community service activities. This will allow the chair to know who will be participating.

Send out reminder notice to all members one week prior to the club, zone, region and district events.

Forward announcements of upcoming all district events, if requested to confirm which members would like to participate.

Communicate to the club marketing communications chairperson the operational aspects of the club, i.e. number of members, newly elected club officers, committee chairs. Include a brief statement of who received thank you letters from the club.

Create a monthly birthday and club anniversary list by member and date (month and date only), send to the marketing communications chairperson to include in the newsletter and the club president to announce at each club meeting.

### **Report Membership Changes Monthly**

Report members monthly via the [Lion Portal](#) or use the paper form of the [Monthly Membership Report](#).

[Log into the Lion Portal](#) – If you have never registered as a user of the Lion Portal before, you may do so on this page. Be sure to write down your user ID and password in a safe place once you are set up.

Adding, Transferring and Dropping Members in the Lion Portal – Visit the training videos located on your home page of the Lion Portal.

[Membership Application](#) – This writable form may be emailed directly to a new prospective member. Use this information to report this member into the club’s roster in the Lion Portal.

[Application for Life Membership](#) – This application is for members that meet the criteria to become Life Members of the Association.

### **Communicate with the District**

When you use the Lion Portal, the information you report about your members, your elected officers or your club’s service is instantly available to your zone and region chairperson as well as the district officers.

### **Report Service Activities as a Backup for the Club Service Chairperson**

Report service activities in the Lion Portal monthly unless completed by the club service chairperson.

### **Quarterly Meetings**

#### **Zone Meetings**

Zones consist of a group of 4 to 8 surrounding area clubs. The club officers from these clubs meet on a quarterly basis, usually during the first three quarters of the fiscal year, led by your zone chairperson. If you don’t know who your zone chairperson is, you can find this information by logging into the Lion Portal and clicking “my club” and on the club details page click “zone”. Once on this page, select “club officers”. Look there for your zone chairperson’s name and contact information.

[The Model District Governor Advisory Committee Meeting](#) – This guide assists both the zone chairperson and club officers understand what to expect at the quarterly zone meetings. Often times the zone chair asks a club to report regarding service, membership or other events. Each meeting may have a specific focus and provides an opportunity for club officers to meet and learn from each other.

## **Semi-annual Tasks – Focus on December and June**

### **Review and Update the Club Roster**

Your club will be invoiced twice a year by the international association. Most districts and multiple districts also invoice dues twice a year. Prior to invoicing your club members for their total club dues, the roster needs to be reviewed. Make sure that it accurately portrays a list of members still active in the club.

Ensure that the club roster for December and June have been reviewed thoroughly. The Lions fiscal year runs from July to June.

[New Membership Dues Billing and Fees](#) – This chart shows the international dues and fees that will be billed to the club for members based on the month in which the new member is reported.

For accurate billing and communications, keep the club roster of membership information updated at all times.

## **Annual Events**

### **Club Elections**

Elections are usually held at the beginning of the fourth quarter (April). Refer to the [Standard Club Constitution and By-Laws](#) for the provisions regarding elections.

The nominations committee will provide information for the names of those who have been nominated for officer and director positions. The secretary will then prepare ballots for elections as per policy. See “Exhibit B” in the [Standard Club Constitution and By-Laws](#).

Report new incoming club officers by April 15, or directly after the club completes its elections, the club president or secretary may report officers and directors via the [Lion Portal](#) or via the Officers Reporting Form [PU101](#). Visit the training videos located on your home page of the Lion Portal.

## **District/Multiple District Conventions**

The Club Secretary may be called upon to assist with several tasks associated with the district or multiple district conventions. The district may contact the club leadership to confirm and process items in preparation for the district conventions.

Check with the cabinet secretary or council secretary regarding requirements to report the delegate certification list for the district conventions. The delegate formula is defined in [The International By-Laws, Article IX](#).

Complete any requested registrations for district events, including advertising, hospitality rooms and convention attendees.

Check with the convention organizers for the opportunity to participate in the printed convention program ad pages or club reports.

Process documents and any local club endorsement requirements for members running for higher officer positions.

## **Delegates for the International Convention**

Each club is entitled to participate in the election of International Officers by assigning club members to serve as voting delegates to the convention. See the information about the international convention voting and assigning delegates located on the LionsCon [webpage](#).

## **Manage Club Governing Documents**

[Standard Club Constitution and By-Laws](#) – Your club may have its own constitution and by-laws. If not, your club comes under the *Standard Club Constitution and By-Laws*. Be sure to keep the most current edition available for references needed by club. Amended versions need to be distributed to all members.

**Club policies and procedures** – If your club has written policies and procedures, keep a printed copy with you for all board and general club meetings, should questions arise regarding either.

## **Year-end Check List**

### **Complete Award Applications**

[Club Excellence Award](#) – Clubs and district that excel in community service, membership growth, communication and organizational management may qualify for the prestigious Excellence Award.

Additional appreciation plaques, awards and Lions branded recognition products are available in the [Lions Shop](#).

## **Prepare Documents and Orient the Incoming Secretary**

**Bank signatories** – It is important to approve a resolution authorizing new signatories for club accounts at a board meeting after the completion of the club officer elections and prior to them taking office in the new fiscal year. The resolution should also contain the names of officers being removed as signatories at the end of the fiscal year. This resolution should be recorded in the club minutes and upon request may be made available to the club's banking institution.

A notebook is often used to retain documentation of agendas, minutes, membership rosters and reports, new member applications, committee reports and important correspondence for the year. If this is maintained on a monthly basis, it will be ready to serve as a reference for the incoming club secretary. If the club choosing to retain files electronically, all items that pertain to the documentation of all membership and business proceedings should be included.

## **Legalities and Technicalities**

[Use of Funds Guidelines](#) – This provides guidance on the appropriate use of public funds or administrative funds for clubs and districts.

[General Liability Insurance Program](#) – The International Association of Lions Clubs has a program of Commercial General Liability Insurance that covers Lions on a worldwide basis. All Clubs and Districts are automatically insured.

[Certificates of Insurance](#) – In order to expedite the certificate issuance process, you now have the ability to create certificates of insurance on your own.

**Supplemental Insurance** - In addition to the automatic coverage mentioned above, Lions International now offers Supplemental Insurance Coverage for Clubs and Districts in the United States including Directors & Officers Liability, Crime / Fidelity, Additional Liability Insurance and Accident Insurance.

[Lions Trademark Overview](#) – This guideline is to help you understand the appropriate use of the Lions emblem and trademarks, and when approval is required.

[Lions Clubs International and Lions Clubs International Foundation Privacy Policy](#) – Lions Clubs International and LCIF recognize the importance of protecting the private information of our members.

## **Amendments to Your Constitution and By-Laws**

From time to time, your club may choose to make amendments to your club constitution and by-laws. As club secretary, you may be asked to assist with this process. Check your own constitution and by-laws for the provisions regarding amendments to ensure that the process is completed according to policy. You may be asked to make the necessary draft amendments and communicate with the club members regarding the proposed changes and assist in implementing the required processes to complete the amendments.





**Lions International**

District and Club Administration Division  
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[www.lionsclubs.org](http://www.lionsclubs.org)  
email: [clubofficers@lionsclubs.org](mailto:clubofficers@lionsclubs.org)  
Phone: (630) 468-7084





# Club Treasurer

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## e-Book



**Lions  
International**



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## **Welcome to the Club Treasurer e-Book**

This guide is designed to support you in your role as treasurer for your club. It contains tools and resources for you to be successful not only in your individual role, but as a cohesive team member with your fellow club members and officers.

As club treasurer, you keep the club's financial records in order to ensure the club operates within its fiduciary capacity. You manage the financial operations of the club, including invoicing and payment of dues, recording and processing receipts and payments for both the administrative and public service accounts.

It's easy to navigate the e-Book. Just click on the various sections contained in the Table of Contents pertinent to the tasks you perform to fulfill your role. From there, you will find useful information and hyperlinks that take you directly to tools, resources and documents that make your job easier.

## **Leading Your Club**

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## **Prepare to Lead; Prepare to Succeed**

### **Start with Self-study Training for the Club Treasurer Position**

Log into the [Lions Learning Center](#) (located within the Learn in the Lion Portal) to access online club officer courses which review key aspects of your role and responsibilities.

- Club Officer Training – this module delivers an introductory overview of club officer roles and responsibilities and club structure.
- Club Treasurer Responsibilities – This module provides basic information and resources necessary to prepare for the position of club treasurer:
  - Preparing budgets and setting annual dues
  - Receiving monies and depositing into approved club bank account(s)
  - Making payments on behalf of the club
  - Maintaining separate Administrative and Activity Accounts
  - Preparing Financial Reports for the club and required governmental entities
  - Maintaining club financial records
  - Filing taxes/complying with local tax laws
  - Preparing final financial records and turning over accounts and funds to successor

### **Become Familiar with Your Club Constitution and By-Laws**

Your club constitution and by-laws provide the basic structure and policies to guide your club's operations and to meet the obligations of a club chartered with the International Association of Lions Clubs. It also serves as your club's main reference document if there are questions about appropriate procedures to conduct club business.

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## Managing Your Club Finances

### Your Club Account Statements with Lions International

Your club has an account with Lions International which contains transactions from dues and club supplies. There is a new statement generated each month for you to view and print to pay your bill.

[Best Practice for Financial Transparency](#) – This guide provides basic information for financial reporting, guidelines for reimbursement, the maintenance of bank accounts and conducting year-end audits.

[Payment Instructions](#) – The club may pay its monthly statement by check, PayPal or credit/debit card. Online payment is allowed if the club approves.

[Club Statements](#) – Mailed paper statements may not always be available in the future. To view and print your club’s statement, visit us online for payment options. For further questions regarding your club’s statements please contact Membership Billing Department at [membershipbilling@lionsclubs.org](mailto:membershipbilling@lionsclubs.org)

[Exchange Rates](#) – This chart provides the exchange rate in relation to the US Dollar on a monthly basis.

## **Data Export**

Located within the Lion Portal, the data export allows you to download member contact information, officer contact information and member detail information. This feature can be found under My Club – Data Export.

## **Understanding Membership Types and Categories for Each Member of Your Club**

The rights and obligations of each of your club members and their subsequent membership dues owed are based upon a combination of Membership Type and Membership Category, which affect the international and club- level dues.

[Membership Types and Categories](#) - This quick-reference guide explains the details of various membership programs available:

- **Membership types** - The association provides both regular membership and special discounted membership programs for families, college students, former Leos and young adults. These types determine international fees and dues levels billed to each Lion.
- **Membership categories** - There are several membership categories which provide various levels of involvement for regular club members to best fit their needs as volunteers. Local club dues may vary for these categories and those dues levels are provided for in the club’s constitution and by-laws.

[Membership Dues Billing and Fees](#) – This table provides the pro-rated international dues billed to your club for members who join during the fiscal year. It also provides the pro-rated dues amounts for membership types that receive a discounted-dues rate.

## **Invoicing Dues to Each Club Member**

With a small amount of preparation, it will be much easier to issue a dues invoice for each member of your club. You will need to gather information from several sources in order to complete the dues invoicing process. Some of the information you need to complete the task may be found in the Lion Portal, including the club statement and the current club roster.

Work with your club secretary to complete a data download of your current club roster so that you have an accurate and complete list of all members.

View and print your club statement from the Lion Portal, showing the international dues billing from the association. The total amount of dues your club assesses to each member of the club is a combination of International, multiple district, district and club-level dues owed for each individual member.

- Use the dues billing provided by the international association on June 30 and December 31 each fiscal year. The approved dues adjustment will be effective July 1, 2023. Dues for the 2024-2025 Lions year will increase to US\$48 per year. To learn more about the updated dues billing and to see the pro-rated billing for new members, visit the *New Membership Dues Billing and Fees [table](#)*.
- Contact your multiple district and district treasurers if you are not aware of the dues amounts being assessed by your multiple district and district respectively. Most multiple districts and districts bill a flat fee per member.
- Finally, add the appropriate club-level dues applicable to each of your members as determined by their Membership Category.

### **Keeping Your Club in Good Standing**

Your club has an obligation to pay its dues at all levels; international, district and club to remain in Good Standing. The Board Policy Manual defines Good Standing as a club:

- a. Which is not in “status quo or financial suspension”;
- b. Which operates in accordance with the provisions of the International Constitution and By-Laws and International Board Policy;
- c. Which has:
  - (1) District (Single, Sub-and Multiple) dues and fees paid in full; and
  - (2) No unpaid balance of International dues and fees greater than U.S.\$10; and
  - (3) No unpaid Lions Club International account balance greater than U.S.\$50, outstanding ninety (90) days or more.

[Financial Suspension Policy](#) –This policy explains consequences of not paying international dues in a timely manner. If a club is placed in Financial Suspension, it may be cancelled if the outstanding dues are not paid before the 28<sup>th</sup> of month following the month the club is placed in suspension.

Reactivating Your Club from Cancellation due to Financial Suspension – contact the Membership Billing Department at [membershipbilling@lionsclubs.org](mailto:membershipbilling@lionsclubs.org) for assistance.



## **Purchase Club Items Online at the Lions Shop**

The [Lions Shop](#) is an easy way to order the most commonly used supplies and Lions International branded merchandise.

Following are frequently requested items:

- [Club Meeting Supplies](#) – This section of the club supplies online catalog contains gavels, gongs, meeting forms, and member name badges.
- [New Member Kits](#) – The items contained in the New Member Kit welcome a Lion into the organization and recognizes the new member's sponsor as well. Club Presidents, Secretaries and Treasurers who are logged into their Lion Account may request new Member Kits online.
- [Lions Apparel](#) – This area contains club vests, shirts, caps and other popular clothing items.
- [Peace Poster Kit](#) – Please note that these kits are available for purchase only from January 15 through October 1 each year.
- [Awards and Recognition](#) – Browse this department for various medals and certificates. This section contains a wide variety of plaques, medals, certificates, and other award products to help you recognize outstanding Lions Clubs.

If you have further questions regarding club supplies, please email [orderdetails@lionsclubs.org](mailto:orderdetails@lionsclubs.org).

## **The First 30 Days in Your Position**

The beginning of the fiscal year is a crucial time for a treasurer to complete several financial management tasks. This includes working with the club secretary to obtain an accurate roster of the club to issue annual dues to the club members. You should also set up a system to organize and maintain:

- the administrative and activity accounts
- revenue and expense receipts
- statements from financial institutions
- monthly financial reports for the club board and membership

## **Attend Club Officer Training Offered by Your District**

The training offered through your district is designed to assist your entire team of club leaders to be more effective as a leadership team and provides an opportunity for each officer to learn the basic skills of the most common tasks.

## **Prepare Your Officers for Access to your Local Financial Institution**

Obtain new signature authorizations as required by the club's financial institution to provide rights to disburse funds on behalf of the club for the newly elected club officers.

Make sure the club is stocked with paper receipts, checks, deposit slips and any other supplies necessary to carry out the financial transactions of the club.

## **Check the Outstanding Club Account Balance in the Lion Portal**

[Log into the Lion Portal](#) – On the Home page, select “My Club”, then “Club Statements” to check for your club's account balance. In July, your club's account balance should contain the first statement of international dues owed by the club. You may want to indicate in the Lion Portal that you want to “opt out” of receiving paper statements and always use the Lion Portal for your statement tracking.

## **Prepare Dues Invoicing**

The international, district and multiple district dues invoices your club will receive are all based on the club roster as of June 30 and December 31. District and multiple districts rarely issue credits for dues invoiced, so it is important for the club secretary to keep the membership roster accurate. To ensure that your club is not held accountable for dues owed by members that are no longer in your club, work with your club secretary to review your membership roster immediately in July.

To create an accurate club roster that includes each member's membership type and category, start by viewing reports in your club in the Lions Portal under My Club, Club Actions, View Reports and select from the drop down options.

Work with your club secretary to complete a data download of your current club roster so that you have an accurate and complete list of all members.

Create invoices for each club member using your club's chosen financial tracking system.

## **Monthly Tasks**

### **Monthly Accounting and Book Keeping Tasks**

Good accounting practice is the result of keeping all revenues and expenses properly processed and recorded. Financial transparency is the result of reporting the status of all club financial accounts to the board and the members on a monthly basis. These are some critical tasks to be completed each month:

Promptly deposit all revenue monies into the appropriate administrative or activities account and obtain receipts, properly categorize per accounting best practices.

Make payment on all outstanding bills of the club, keeping administrative and activity account monies separate.

Club Statement – Check in the Lion Portal each month to view your club statement from Lions International. [Pay outstanding balance owed](#) to Lions International.

Balance all monthly statements from the club’s financial institution(s) immediately upon receipt.

For both the Administrative Account and the Activities Account(s):

- Prepare printed month-end financial reports as soon as the previous month’s transactions are recorded and finalized.
- Prepare distribution of monthly reports for both the club and board meetings, including cash flow, profit and loss, balance sheet and budget comparison.

Retain all monthly financial reports for permanent records.

### **Processing Newly Recruited Members**

Your club membership chairperson will work closely with the club secretary when adding new members to your club. When a new member joins the club, the membership chairperson will assist the member in selecting the membership category that appropriately matches their chosen level of involvement with the club.

In addition, there are different membership types which offer a reduced level of international dues, including family membership, student membership and Leo to Lion membership. Use the [Membership Dues Billing and Fees](#) to calculate the total international dues owed for members who join during the fiscal year.

### **Quarterly Meetings**

#### **Zone Meetings**

Zones consist of a group of 4 to 8 surrounding area clubs. The club officers from these clubs meet on a quarterly basis, usually during the first three quarters of the fiscal year, led by your zone chairperson. You can find this information by logging into the Lion Portal and clicking “my club” and on the club details page click “zone”. Once on this page, select “club officers”. Look there for your zone chairperson’s name and contact information.

[The Model District Governor Advisory Committee Meeting](#) - This guide assists both the zone chairperson and club officers know what to expect at the quarterly zone meetings. Often times the zone chair asks a club to report regarding membership, service or other events. Each meeting may have a specific focus and provides an opportunity for club officers to meet and learn from each other.

## **Semi-Annual Tasks - Focus on July and January**

In both July and January, prepare and distribute the dues invoices to all club members.

Collect dues payments from members, provide receipt of payment and deposit into Administrative account.

[Pay international dues](#) to Lions International. Pay district and multiple district dues upon receipt from the district cabinet treasurer and multiple district council treasurer.

## **Annual Tasks**

Prepare budget for upcoming fiscal year and present it to the club for approval per the club constitution and by-laws.

Prepare tax filings – Organize all financial records as required by local law to comply with tax laws.

## **Year-end Check List**

### **Prepare Documents and Orient the Incoming Treasurer**

A full set of all revenue and expense receipts, bank statements, tax filings, financial reports provided to the board of directors and general ledgers of all transactions should be prepared for file retention with the club secretary and a set available as a reference for the incoming club treasurer.

**Bank signatories** - It is important for the board of directors to approve a resolution authorizing new signatories for club accounts. This may be completed at a board meeting after the club completes its officer elections and prior to the new fiscal year. The resolution should contain the names of officers that are being added as signatories as well as those that are being removed at the end of the fiscal year. This resolution should be recorded in the club minutes and then provided to the club's banking institution upon request.

Club financial records must be audited annually, and findings reported to the board of directors and all club members.

Prepare and retain all financial records for permanent records. Turn over all accounting ledgers, check-books and banking institution statements containing current account balances to the incoming treasurer.

### **Legalities and Technicalities**

[Use of Funds Guidelines](#) – This provides guidance on the appropriate use of public funds or administrative funds for clubs and districts.

[General Liability Insurance Program](#) – The International Association of Lions Clubs has a program of Commercial General Liability Insurance that covers Lions on a worldwide basis. All Clubs and Districts are automatically insured.

- [Certificates of Insurance](#) – In order to expedite the certificate issuance process, you now have the ability to create certificates of insurance on your own.
- Supplemental Insurance – In addition to the automatic coverage mentioned above, Lions International now offers Supplemental Insurance Coverage for Clubs and Districts in the United States including Directors & Officers Liability, Crime / Fidelity, Additional Liability Insurance and Accident Insurance.

[Lions Trademark Overview](#) – This guideline is to help you understand the appropriate use of the Lions emblem and trademarks, and when approval is required.

[Lions Clubs International and Lions Clubs International Foundation Privacy Policy](#) – Lions Clubs International and LCIF recognize the importance of protecting the private information of our members.

### **Amendments to Your Constitution and By-Laws**

From time to time, your club may choose to make amendments to your club constitution and by-laws. As club treasurer, you may be asked to assist with this process. Check your own constitution and by-laws for the provisions regarding amendments to ensure that the process is completed according to policy. You may be asked to make the necessary draft amendments and communicate with the club members regarding the proposed changes and assist in implementing the required processes to complete the amendments.



## **Lions International**

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# Best Practices for Financial Transparency

*Integrity and transparency are at the very heart of a Lions club. Sound and clear communication is critical to achieve this goal.*

This flyer was designed to provide general best practices, but it should be noted that every club should consult an accounting professional to ensure that the club is compliant with local regulations and the district rules of audit to further ensure that the club is engaging in appropriate business practices.

## Financial Reporting

The club should outline in the club constitution and by-laws that the board of directors should receive the club's financial report no less than monthly and the original bank statement on a regular basis. Care should be taken to ensure that the bank statement and the financial report balance.

The Financial Report should include:

1. **Opening Balance** – The balance that was reported during the previous meeting. The report should include the amount in each account.
2. **All income** – Note the amount and source of the income.

Fundraising events should include an itemized report outlining the money received and each expense paid. Every significant expense requires an invoice sent or receipt and the income should be validated by attendance, ticket sales or some other quantifiable means. The club may establish a definition of the amount requiring a receipt.

3. **All Expenditures** – All payments made which were approved by the board of directors.

It should be noted that all payments must be approved by the club's board. Sometimes the expense payment approval is included in the club's budget approval process or by separate formal resolutions. Either way, the approval requires a quorum and must be reflected in the minutes. Receipts and invoices received should be obtained to verify the amount spent.

4. **Ending Balance** – The final amount is provided, which will be the opening amount the following month.

## Reimbursement Procedures

As noted, reimbursement should only be done when the expense is approved by the board of directors and includes an invoice or receipt for the club's records. The club may establish a minimum amount that would not require a receipt, but this should be only for very small amounts.

## Bank Account Management

### Have two Bank Signatories

Bank accounts should include the treasurer and another officer as signatories and every check should bear the signature of both if appropriate. The two signatories should be from different households.

### Maintain at least Two Accounts

Article XI of the Standard Club Constitution and By-Laws defines two types of club funds.

1. **Public (activity) funds** – which includes all funds raised from the public must be returned to the public use, including money accumulated from invested public funds. The only deductions that can be made from the activity account are the direct expenses relating to the fundraising activity. Money accumulated from interest must also be returned to public use.
2. **Administrative funds** – which includes funds supported through contributions from members through dues, fines and other individual contributions. It is recommended that these funds be kept in separate accounts so they can be easily tracked and reported.

Some clubs create accounts for special projects or fundraisers. Every account should be included in the club's financial report.

### Ensure Visibility

In addition to inclusion on the club's financial report given to the board of directors, every account should be reviewed by two or more members of the board on a regular basis. These members should also ensure that the bank statements align with the financial statement.

### Update access (and the password) to the account annually.

Each year, as new officers are elected, the account should be updated and the passwords changed to protect the funds.

### Changing Accounts or Banks

Any change to an account, including changes to a new bank, should require approval by the club's board of directors.



## Conducting Audits/Reviews

While a club should regularly seek the advice of an accounting professional to ensure compliance with local laws, the club should also conduct an annual audit of club accounts when the responsibility transitions to a new treasurer or at the end of each term. The review should include the following:

1. Bank statement at the close of the year.
2. Minutes showing the approval of expenditures and income.
3. Fundraising, event and project reports that have financial implications and provide information regarding the collection or disbursement of funds.
4. Receipts, thank you notes, invoices and other evidence of disbursement.
5. Final year-end report, showing the income and expenses for the year, which should reconcile with the above mentioned documents.
6. Paperwork or registration of the names on the account and the revisions to the account at the change of the fiscal year.

### Why it is Important that the Treasurer be Bonded

Insuring (bonding) a treasurer provides the club protection and assurance that in the event the treasurer engages in criminal behavior or otherwise breaches their duty to the club, the club will not suffer as a result. This is not available in all countries and you may need to contact a financial or legal advisor for more information.

### What to do when Fraud is Suspected

If the financial standing of the club is in question or fraud is suspected, the club officers should investigate such matters, and determine whether fraud occurred or whether it was merely an unintentional oversight. Discuss your concerns with the club's board of directors and ask for clarification. If there is evidence that an inappropriate action took place, a complaint may be filed under the [Club Dispute Resolution Procedure](#). Your district leaders may utilize the Club Dispute Resolution Procedure and a neutral conciliator may review the complaint and may help the club determine how it can improve its financial practices. However, if the club's board of directors has determined that criminal laws were broken, then the club may consider filing a formal complaint with the local authorities. Although we encourage Lions to clarify any doubt in their behavior, on occasion, criminal charges may be appropriate so as to insure the public that the club is taking action and to maintain the trust of the public and those that donate to the local Lions club.

However, keep in mind that this can be a learning experience, and not every situation that arises may arise to the level that criminal charges need to be filed. One of the purposes of the Club Dispute Resolution Procedure is to provide guidance to resolve disputes and address concerns of club members. This ensures that the club's practices can be fully transparent and provide the club with a high level of financial integrity, so every member in the club can rest assured that the work that they have done is truly assisting someone in need and in accordance with the club's intentions and the policies and procedures of the Association and International Board of Directors.



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# GLOBAL ACTION TEAM



## Club Chairperson (Club President)

### Position Overview

As the club president you will serve as the club chairperson of the Global Action Team. You will ensure that your club's GLT, GMT, and GST chairpersons are collaborating and implementing plans to develop skilled leaders, strengthen membership, and expand the club's humanitarian service. Your actions define the pathway for your club to ensure its success in executing the *MISSION 1.5* membership growth plan, implementation and achievement of goals, as established.

### Actions for Success

- Commits to the organization-wide goal and objectives of *MISSION 1.5*, which includes achieving defined regional membership targets.
- Supports an annual membership growth plan as defined by *MISSION 1.5* in collaboration with the club membership chairperson.
- Ensures club data is input, tracks club data and reports progress and challenges during check in calls with zone chairperson.
- Ensures that qualified Lion leaders are appointed and reported for the club's marketing chairperson and Global Action Team positions (club service chairperson, club membership chairperson and club vice president, who will serve as the leadership development chairperson.)
- Supports member retention by creating a harmonious club atmosphere (ensuring club members feel part of the Lion family while serving the local community.)
- Encourages participation in leadership trainings and develops a succession plan.
- Acts as an active member of the district governor's advisory committee, of the zone in which this club is located, to learn and share best practices.
- Shares successes, opportunities and needs with the club officers, the district Global Action Team members and LCI staff.
- Collaborates with their team to conduct relevant *MISSION 1.5* seminars, events, and projects during club and zone meetings, conventions and district trainings.

### Measuring Success

At the end of each Lion year:

- Supports club net membership growth as defined by *MISSION 1.5* including sponsoring at least one new member.
- Conducts at least one more membership drive in the community than the prior year.
- Contacts a minimum of two former members about returning to the club.
- Ensures that new member orientation occurs, and that all new members participate.
- Ensures that incoming club officers participate in club officer training.
- Implements at least one service project or fundraising event in tandem with local Leo club or youth service organization.

### Reporting

- The Global Action Team club chairperson (club president) reports to the club officers and board of directors and the Global Action Team district chairperson (district governor).



# GLOBAL ACTION TEAM



## Global Membership Team (GMT) Club Membership Chairperson

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<b>Term</b>	One year elected position as a club officer and member of the board of directors.
<b>Position Overview</b>	<p>As the GMT club membership chairperson, you ensure that your club has the membership to create a greater impact through community service. By bringing new members into your club, not only will you develop new friendships, but you will ensure your club will have a stronger foundation to serve the needs of your community. Your actions define the pathway for your club to ensure its success in executing <i>MISSION 1.5</i> membership growth plan implementation, and achievement of goals, as established.</p>
<b>Actions for Success</b>	<ul style="list-style-type: none"><li>• Commits to the organization-wide goal and objectives of <i>MISSION 1.5</i>, which includes achieving defined regional membership targets.</li><li>• Develops, supports and executes an annual membership development plan in support of <i>MISSION 1.5</i>.</li><li>• Tracks club membership data and reports progress during check in calls with zone chairperson.</li><li>• Collaborates with the district Global Action Team on membership initiatives, and participate in relevant district, region and zone meetings and events.</li><li>• Develops and leads a membership committee to help implement action plans to achieve the club's membership goals and to positively improve the member experience.</li><li>• Encourages all members to participate in membership growth by inviting prospective members to club activities and by following up with them promptly.</li><li>• Promotes a harmonious club atmosphere by listening to and addressing member ideas and concerns via member surveys or other opportunities for feedback.</li><li>• Collaborates with the club service chairperson as well as other club committees to promote membership opportunities.</li><li>• Ensures that new members are provided with an effective orientation so new members understand how the club operates within its district, multiple district and Lions International, with the support of the Club 1<sup>st</sup> Vice President/Club Leadership Chairperson.</li><li>• Attends the district governor's advisory committee meeting of the zone in which this club is located, when appropriate.</li><li>• Collaborates with their team to conduct relevant <i>MISSION 1.5</i> seminars, events, and projects during club and zone meetings, conventions and district trainings.</li></ul>
<b>Measuring Success</b>	<p>At the end of each Lion year, in collaboration with the club president, ensure that your club:</p> <ul style="list-style-type: none"><li>• Achieves club net membership growth as defined by <i>MISSION 1.5</i> including sponsoring at least one new member.</li><li>• Conducts at least one more membership drive in the community than the prior year.</li><li>• Contacts a minimum of two former members about returning to the club.</li><li>• Increases total membership over the previous Lion year.</li></ul>

- Ensures that new member orientation occurs, and that all new members participate.

## **Recommended Qualifications**

- Passionate about Lions and is invested in the club's future.
- Leads by example; actively sponsoring new members.
- Strong project management, public speaking, and presentation skills.
- Able to use technology (Email, Microsoft Office, Lion Portal, LCI website, social media).

## **Reporting**

- The GMT club membership chairperson reports to the GMT and GET district coordinators.
- The GMT club membership chairperson, GST club service chairperson, and the GLT club leadership development chairperson report to the Club Global Action Team chairperson (club president).



# Club Membership Chairperson

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e-Book



**Lions  
International**





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## **Welcome to the Club Membership Chairperson e-Book!**

This e-Book is designed to support you in your role as membership chairperson for your club. It contains tools and resources for you to be successful not only in your individual role, but as a cohesive team member with your fellow club members and officers.

It's easy to navigate the e-Book! Just click on the various sections contained in the Table of Contents pertinent to the tasks you perform to fulfill your role. From there, you will find useful information and hyperlinks that take you directly to tools, resources and documents that make your job easier.

### **Prepare to Lead; Prepare to Succeed**

You as the Club Membership Chairperson serve in the critical role of facilitating positive membership growth through the addition of quality members to your club. Potential members may be introduced to your club when your fellow club members invite guests to your club events or through club-organized membership drives for larger groups of potential members. More importantly, as a result of local service projects where you will find involved and highly committed fellow citizens, your club has an opportunity to attract new members that share a passion to provide humanitarian service.

If you spend some time studying, attending training, and planning to fulfill the responsibilities of your position prior to the start of your term in office, you will better support the membership growth efforts of your club.

### **Familiarize Yourself with the Lion Portal**

MyLCI is an online portal which connects you directly to the international association. It provides easy access to club member information to help you maximize communications and report new members to the association through the club secretary.

If you will be using the Lion Portal for the first time, once you have been reported as the incoming club membership chairperson, you may establish your user ID and password any time after April 1. You will initially have access to the training area until the beginning of your term in office on July 1, when you will gain full access to the Lion Portal.

## Create Your Lion Account Login

The [Member Portal](#) – allows you access to all Lions applications: MyLion, MyLCI, Insights, Learn and Shop.

Log into the Member Portal with your Lion Account – an easy-to-use, single sign-on to our digital ecosystem. Don't have a Lion Account? [Register here](#).

[Registration and Password Instructions](#) - These easy instructions will aid you in gaining access to MyLCI if you haven't already set up your profile.

- MyLion – Connect.Serve.Report! This site is where clubs report service, plan their service projects, connect with other Lions and create personal profiles. If you have further questions regarding MyLION, please email [MyLION@lionsclubs.org](mailto:MyLION@lionsclubs.org)
- MyLCI – Tools for the Lion leaders! This site is where the club can manage their membership, create district and club profiles, check club voter eligibility, document and plan conventions as well as check new club charter application status. If you have further questions regarding MyLCI, please email [myLCI@lionsclubs.org](mailto:myLCI@lionsclubs.org)
- Insights – Comprehensive overview of Lions International in the areas of Membership, Service Activity, Donations and Club strength. Also featured is District Goals Progress and Learn.
- Learn – Provides Lions and Leos a central location to complete Lions Learning Center (LLC) courses, search for Lions International Institutes (FDI and LCIP), view local trainings as reported by Multiple District and District GLT Coordinators and allows an individual Lion or Leo to access their "My Learning Record" report.
- Lions Shop – An easy way to order the most common club supplies and Lions International branded merchandise. Club presidents, secretaries or treasurers can login to their Shop account through the Member Portal and use club funds to purchase items. If you have further questions regarding club supplies, please email [orderdetails@lionsclubs.org](mailto:orderdetails@lionsclubs.org)

## Evolving our digital tools

- Coming in 2024, we'll be combining MyLion, MyLCI and Insights, along with some additional tools and functionality, into a new unified experience called the Lion Portal. The new system will offer the same features and functionality currently available, but with a more consistent and efficient experience. Find out more [here](#).

## Tools and Resources Available to you

If you are new to the position of club membership chairperson, or just want to be sure that you have the most updated position description, tools, and resources available, it is good to spend some time exploring the many resources available to help you prepare for the year. Many are located on the Lions International website. Start by gathering and understanding the tools and resources available for you.

## Putting Together a Plan to Support Your Club's Membership Growth and Vitality

Remember, membership growth comes from two ideas, first you need to keep the members that you already have in your club happy so they keep coming back, second you should have a plan for attracting new members to your club. Below are some useful tools available for your club to assess previous efforts and keep itself focused on a plan for meaningful service, positive membership growth and continual successful leadership succession to keep your club fresh and responsive to its members' and community's needs.

- [Club Quality Initiative](#) - If you are new to your position on the board, check with your club president to see if your club completed a club quality Initiative, which may contain some feedback from members from the previous year's activities. Pay attention to any specific goals that the club set regarding its efforts to grow membership and improve membership satisfaction.
- [Plan for Your Club's Success](#) - Success starts with a vision! Use this planning guide to discover your club's strengths, ways to improve and new opportunities that will help your club grow and thrive! Planning forms help develop a vision.
- [Your Club, Your Way!](#) - Are your club's meetings all that they can be? You have a choice...Your club has the freedom to structure club meetings in a way that best meets your members' needs. This guide includes a number of options to consider and tips to encourage attendance and involvement.
- [Exceeding Expectations](#) – This process was designed to support the club membership chairperson and/or club officer team through an easy assessment process to identify club membership strengths and challenges.
- [Membership Satisfaction Guide](#) – This guide was created to help you consider your members' experience and expectations — and plan accordingly. To engage members to cultivate a strong membership culture centered on recruiting new members, retaining current members, and recapturing former members. To ensure that your Lions club remains strong, you must consider your members' experience and expectations.
- [Membership Chair Survey Results](#) – Once you have conducted a survey of your members through the Club Quality Initiative, Exceeding Expectations, the Membership Satisfaction Guide, or others, use this template to help share the results with your club to help ensure clear communication to all club members about what you learned and what next steps may be.

## Review the Club Membership Guide

[Club Membership Chairperson Guide](#) - As the club membership chairperson, you play an important role in the health, longevity, and ability of your club to serve the community. As a member of your club's Global Action Team, you'll also have the opportunity to work with your club's service and leadership chairs on leadership development, membership growth, and service initiatives. By following the Global Membership Approach process, you can ensure that your members have a meaningful, impactful, and rewarding club experience.

### **MISSION 1.5**

[MISSION 1.5](#) – Is a dynamic initiative designed to engage and empower Lions Club membership chairpersons in recruiting new members while also providing a unique opportunity to contribute to the growth of Lions International. This program encourages chairpersons to actively participate in outreach and recruitment efforts, fostering growth with their respective Lions Clubs.

Additionally, **MISSION 1.5** introduces a special recognition in the form of [MISSION 1.5 awards](#) aimed at celebrating and acknowledging outstanding achievements in membership recruitment. By combining the goals of expanding club membership and promoting new club development, **MISSION 1.5** offers chairpersons a dual incentive to drive the success and impact of their Lions Club.

## Recruiting New Members

The [Just Ask! Fostering a Culture of Recruitment Guide](#) will assist your club in navigating the Global Membership Approach process to recruit new members and effectively manage club growth by cultivating a culture of recruitment in your club.

## International dues

The dues adjustment includes a US\$7 increase to the current US\$48 international dues, spread out over three years. Under the proposal, international dues would be adjusted according to the following schedule:

- US\$2 increase on July 1, 2024
- US\$2 increase on July 1, 2025

## Understanding Membership Types and Categories for Each Member of Your Club

Membership types and categories allows flexibility in levels of involvement of an active member so that membership in a club is flexible in today's busy lifestyles.

- [Membership Types and Categories](#) – This quick-reference guide explains the details of various membership programs available:

- **Membership types** – The association provides both regular membership and special discounted membership programs for families, college students, former Leos and young adults. These types determine international fees and dues levels billed to each Lion.
- **Membership categories** - There are several membership categories which provide various levels of involvement for regular club members to best fit their needs as volunteers. Local club dues may vary for these categories and those dues levels are provided for in the club's constitution and by-laws.

## Special Membership Programs

- [Family Members](#) - The Family Membership Program applies to family members who are (1) eligible for Lions membership, (2) currently in or joining the same club, and (3) living in the same household and related by birth, marriage or other legal relationship. To be part of the Family Membership Program, your club secretary must complete the Family Unit Certification Form or file online. Family members shall not count toward the club delegate entitlement until they have been full dues paying members for a year and a day.
- [Young Lion](#) – Young Lion members bring new energy and diverse skills into your club and ensure your club will be in existence for years to come. Young adults want to volunteer and are volunteering at a higher rate than in the past. We've made it easier to get them involved by providing you with the tools you need.
  - The [Young Lions membership guide](#) and [Connecting to Young Lions Guide](#) teach existing clubs why young Lion want to volunteer and provides ideas to revitalize how the club operates in order to attract young Lions.
  - [Young Lion Leaders Ignite the Power of Action](#) - This video highlights young Lions involvement in the service and leadership.
  - [Young Adults](#) – Young adults through the age of 30 receive an entrance fee waiver and pay half international dues when joining a Leo-Lion club.
- [Student Member Programs](#) – Students enrolled in an educational institution and between the age of legal majority and through age 30 can take advantage of the Student Member Program and pay only half international dues. Their charter or entrance fee is waived. Students over age 30 joining Campus Lions clubs pay a discounted charter or entrance fee of USD \$10 and full international dues.
- [Club Branches](#) – This page contains information and tools about club branches, which can provide flexibility and attract different types of Lions, allowing your club's membership to grow and diversify. Club branches can also bring together people with a variety of service interests to form a specialty club branch. These resources on this page can assist you in getting started.

- [Leo to Lion Transition](#) – Current and former Leos between the age of legal majority and 35 who have been a Leo for at least a year and day are eligible to become a Leo-Lion. Leo-Lions are eligible to join or charter Lions and Leo-Lion clubs, and they may have dual membership to be a Leo provided they are eligible for both a Lions and Leo club. All former Leos who were Leos for at least a year and a day regardless of age are eligible to receive a charter/entrance fee waiver.
- [Lions Worldwide Induction Day](#) - Lions Worldwide Induction Day is a worldwide event that welcomes new members and gives Lions the opportunity to stimulate membership growth and increase public awareness. Take action and start planning for Lions Worldwide Induction Day.
  - [Worldwide Induction Day Planning Guide](#) - This comprehensive guide includes event planning tips, recruiting ideas and public relations suggestions to help your club, district or multiple district conduct a successful and meaningful event.

## Adding Newly Recruited Members

Your club secretary will work closely with you when adding new members to your club. When a new member joins the club, assist the member in selecting the membership category that appropriately matches their chosen level of involvement with the club. In addition, it is important to be aware of the various membership types available through the association that provide a potential member a reduced level of international dues, including family membership, student membership and Leo to Lion membership.

- [Membership Application](#) - This writable PDF form may be emailed directly to a prospective new member. You may use the information from the form to add new members in MyLCI. Be sure to retain a copy of all new member applications with your official club documents and make a copy to give back to the prospective member.

## New Member Orientation

- [New Member Welcome Book](#) - This guide explains a bit about the mission of the organization, service projects, structure of the org, etc.
- [New Member Orientation Training Guide](#) - helps the orientation trainer plan for new member orientation and gives trainer tips along the way to successfully conduct new member orientation.
- [New Member Orientation Guide](#) - New members follow the orientation trainer during orientation. Members can also use the guide as a reference during their time as a Lion.
- [New Member Orientation PowerPoint](#) - provides the orientation trainer with a presentation template to follow when conducting new member orientation. Trainers should customize the presentation so it is relevant to their club.
- [The Lions Mentoring Program](#) - can be used in conjunction with new member orientation to ensure the new member successfully completes both programs.

## Mentoring Program

The objective of the Lions Mentoring Program is to help every member achieve the goal of better serving his or her community. It does so through a program of personal development that helps members realize the potential that their unique skills and knowledge offer. The Lions Mentoring Program prepares them for leadership in clubs, in the association and in their personal lives as well. For Lions International, this means more hands and better service for the people who need it most.

- [Basic Mentoring Program Guide](#) - The Lions Basic Mentoring Program is designed to give structure and coherence to help a new Lion begin his or her career of service.
- [Advanced Mentoring Program Guide](#) - The emphasis of this level is upon developing accountability for results by focusing on community projects and programs that provide useful and needed humanitarian service.

## The First 30 Days in Your Position

The beginning of the fiscal year is a crucial time to complete many tasks. This includes working with the club secretary who will be maintaining the roster of the club and setting the calendar for events and projects. Another important task is to set up a system to retain business records; especially those that pertain to membership.

## Ensure that you have a valid email address on file

Lions International will send monthly communication directly to membership chairpersons to help provide support, guidance and ideas for your success. New tools and resources are always being developed, and there may be awards and recognition for which you may be eligible. Ensuring that your email is up to date will help ensure that you are made aware of all opportunities.

## Attend Club Officer Training Offered by Your District

The training offered through your district is designed to assist your entire team of club leaders to be more effective as a leadership team and provides an opportunity for each officer to learn the basic skills to complete the most important tasks.

## Know Your Members! Review the Club Roster

Stay engaged with your club secretary while reviewing your membership roster immediately in July.

- To find a good report of member information in the Lion Portal, under the My Lions Club/Reports, run the Club Roster of Membership Data Report to be sure all who are listed are still active in the club.



- Use the [Membership Application](#) to collect new member contact information. Add any new members not yet reported to Lions International.
- Along with your club secretary, prepare a list of members who may no longer be active in the club for the board to review for potential removal from the roster.
- The club secretary will make final roster adjustments in the Lion Portal prior to June 30 and December 31 to ensure your club is not invoiced for dropped members. Be sure to confirm with the previous club secretary any membership changes that occurred at the end of the fiscal year.
- Your club secretary can use the Lion Portal to print membership cards once dues have been received from members or order membership cards from the Member Service Center.
- Take note of any Lions in your club who are new to Lions. Lions within their first 3 years are more likely to leave your club than those that have been around longer. Make sure that they have visited the [Welcome!](#) page for new members, and that they understand the benefits and perks of being a Lion.

## Update all Contact Information for Your Members

Current contact information for your members helps to ensure good communication within the club. Use the **Member Information Update Report** in the Lion Portal to gather current contact information for all club members.

- [Lions International Calendar of Events](#) - This online calendar provides important information and dates of major service, leadership and membership programs, initiatives and events, including the International Convention.

## Monthly Tasks

As club membership chairperson, you will complete a set of tasks on a monthly basis. You will be preparing for both club and board meetings.

## Prepare for Programs and Meetings

- Your club may determine the level of protocol that you wish to follow for all visitors. Be sure to communicate your club's traditions and level of formality when welcoming guests so that the guest understands what to expect when visiting your club.
- [New Members Induction Ceremonies](#) - This guide contains suggested wording to induct new members into the club.
- Utilize a sign-up sheet for guests for the purpose of recruitment and potential member list.

- Create a monthly birthday and club anniversary list by member and date (month and date only), send to the marketing communications chairperson to include in the newsletter and the club president to announce at each club meeting.
- You may be asked to assist with distribution of service and membership chevrons, etc. Awards are often provided to the club president for presentation.

## Maintain the Club Business Records

Maintain full documentation of all key membership support functions, including membership applications, to provide to the club secretary for record retention of general membership, committee and board meetings.

## Member Document Management

- [Membership Application](#) - This writable form may be emailed directly to a new prospective member. Give a copy of the application to the club secretary for reporting the new member on the club's roster in the Lion Portal.
- [Application for Life Membership](#) - This application is for members that meet the criteria to become Life Members of the Association.
- [New Membership Dues Billing and Fees](#) - This chart shows the international dues and fees that will be billed to the club for members based on the month in which the new member is reported.

## Quarterly Meetings

### Zone Meetings (District Governor Advisory Committee Meetings)

The District Governor Advisory Committee is made up of a zone chairperson and officers from the four (4) to eight (8) clubs that make up the zone. The club officers from these clubs meet on a quarterly basis, usually during the first three quarters of the fiscal year, led by your zone chairperson.

- [The Model District Governor Advisory Committee Meeting](#) - This guide assures that both the zone chairperson and club officers understand what to expect at the quarterly zone meetings. You can expect to be a key participant during at least one meeting, which will focus on membership. The zone meetings provide you and opportunity to share your club's best practices and to learn from fellow club membership chairpersons.

## Semi-annual Tasks – Focus on December and June

### Review and Update the Club Roster with the Club Secretary

Your club members will be invoiced twice a year by the international association. Most districts and multiple districts also invoice dues twice a year. Your club secretary may ask that together, you two review the roster of members twice a year to make sure that it accurately portrays a list of all members including those recently added to the club.

- [New Membership Dues Billing and Fees](#) - This chart shows the international dues and fees that will be billed to the club for members based on the month in which the new member is reported.

## Annual Events

### District/Multiple District Conventions

Conventions offer great opportunities to share best practices and ideas with other fellow club membership chairpersons. It is an even better way for you and your fellow club officers to bond together as leaders committed to leading your club in improving its quality in service, membership and leadership growth.

## Year-end Check List

### Membership Awards Applications

- [Chevron Award Program](#) - The Chevron Award Program recognizes Lions for their long-term service, beginning at 10 years and continuing in five year increments until 75 years of service. Chevron awards for the current fiscal year are automatically sent to district governors in the first quarter for presentation to the recipients at an appropriate event, such as a district convention or other celebration.
- [Club Excellence Award](#) - Your success as a membership chairperson directly contributes to your club earning this award by achieving excellence in the four main components of membership, service, leadership and organizational excellence and marketing. The best clubs earn this year after year. Work with your club president and secretary to complete this application immediately following the close of your fiscal year.
- [Membership Satisfaction Awards](#) - Clubs that end a fiscal year with a net gain can earn the Membership Satisfaction Award banner patch in two ways.
- [Membership Key Awards](#) – All Lions in your club are eligible to earn membership keys for sponsoring a new Lion that stays active for at least a year. These awards are shipped on a monthly basis to your club secretary. Work with your club secretary to help arrange a meaningful presentation for the members who earn these awards.

- [Extension Awards](#) – All Lions are eligible to earn extension awards. These are presented to Lions who help organize new clubs that remain active and in good standing for at least a year.

## Prepare Documents and Orient the Incoming Membership Chairperson

A notebook is often used to retain documentation of agendas, minutes, membership rosters and reports, new member applications, committee reports and important correspondence for the year. If this is maintained on a monthly basis, it will be ready to serve as a reference for the incoming membership chairperson. If the club choosing to retain files electronically, all items that pertain to the documentation of all membership and business proceedings should be included.

## Legalities and Technicalities

- [Lions Clubs International Privacy Policy](#) - Lions Clubs International recognizes the importance of protecting the private information of our members.
- [Lions Clubs International Foundation Privacy Policy](#) - Lions Clubs International Foundation (LCIF) is committed to protecting the privacy of our website visitors, donors and Lions. Personal information is not sold, rented or shared with any individual or organization.

## Governing Documents and Membership Provisions

- [Standard Club Constitution and By-Laws](#) - Your club may have its own constitution and by-laws. If not, your club comes under the *Standard Club Constitution and By-Laws*. Be sure to keep the most current edition available for references needed regarding the privileges and obligations of different membership categories. Your club secretary should provide you and each new member added to the club a current version.

## Purchase Club Items Online at the Lions Shop

The Club Supplies Store is an easy way to order the most commonly used supplies and Lions-International branded merchandise. Your club president, secretary or treasurer may be able to assist placing orders to be charged to the club account.

Here are some quick links to the most frequently requested items:

- [Club Meeting Supplies](#) – This section of the club supplies online catalog contains gavel, gong, meeting forms, and member name badges.
- [New Member Kits](#) - The items contained in the New Member Kit welcome a Lion into the organization and recognizes the new member's sponsor as well.

- [Lions Apparel](#) - This area contains club vests, shirts, caps and other popular clothing items; many that may be customized with your club's information.
- [Peace Poster Kit](#) - Please note that these kits are available for purchase only from January 15 through October 1 each year.
- [Awards](#) and [Medals](#) - Browse this department for various medals and certificates.
- [Plaques, Awards and Recognition](#) - This section contains a wide variety of products to help you recognize outstanding Lions.

If you have further questions regarding club supplies, please email [orderdetails@lionsclubs.org](mailto:orderdetails@lionsclubs.org).



## **Lions International**

Membership Division  
300 W. 22<sup>nd</sup> Street  
Oak Brook, IL 60523-8842, USA  
[www.lionsclubs.org](http://www.lionsclubs.org)  
Email: [membership@lionsclubs.org](mailto:membership@lionsclubs.org)

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# Club Membership Chairperson's Guide

## Introduction

As the club membership chairperson, you play an important role in your club's health, longevity and ability to serve your community. And as a member of your club's Global Action Team, you'll also have opportunities to collaborate with your club's service chairperson and leadership chairperson on leadership development, membership growth and service initiatives. This guide will help you ensure that your members have a meaningful, impactful and rewarding club experience by following the Global Membership Approach process.

Did you know?

You can download materials from the Lions Clubs International website, [lionsclubs.org/](https://lionsclubs.org/) MembershipChair, or order them by contacting the Membership Division at [membership@lionsclubs.org](mailto:membership@lionsclubs.org)



# Club membership chairperson

## Global Membership Approach

The Global Membership Approach is an innovative process that helps clubs achieve long-term membership growth and retention. We've outlined the steps below to help guide you in your roles as club membership chairperson.

### Build a team: Preparing your club

Your members have many talents and strengths - It is key to identify members who exemplify the three aspects of membership:

- **Recruitment:** Identify and welcome new members
- **Membership Journey:** Improve the membership experience that members are engaged and feel satisfied with their membership
- **Recapture:** Welcome back former members who previously dropped

### Build a vision: Creating your club's vision

By setting goals, you give your members something to strive for. Break down your goals into small, manageable objectives and work on targeting milestones for membership growth and membership satisfaction.

### Build a plan: Implementing your club's growth plan

Develop and implement your membership growth plan by getting your members involved in the plan and the process for reaching your goals and initiatives.

### Build success: Celebrating your club's membership growth

Learn about the process of evaluating, sharing, supporting, recognizing and making necessary changes.

### Take action

The best way to achieve your goals is to get started. Be sure to involve your members so they can be part of the process, and your success.

To learn more and access additional resources, visit [lionsclubs.org/MembershipChair](https://lionsclubs.org/MembershipChair)





## Global Membership Approach in action

As Lions, we naturally have a vision. The Global Membership Approach provides a tested process to share your vision, discover new opportunities and develop common goals together.

It starts with you and your club. Consider these objectives:





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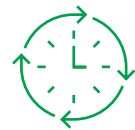
**M**



**A**



**R**



**T**

**SPECIFIC**

Make sure your objective is clear.

**MEASURABLE**

Benchmarks and progress should be measurable.

**ACTIONABLE**

Each goal should be achievable.

**REALISTIC**

Goals should be challenging but not unrealistic.

**TIME-BOUND**

Develop a timeline for achieving your goals.

Implement the plan, measure success and don't forget to celebrate!

Your investment in developing a clearly-defined vision will be worth the effort as long as this plan is implemented.



# Getting started

## Preparing for your role

Before you get started, take some time to understand your new role and get organized. Connect with your last club membership chairperson to learn what worked well and what didn't. Use the *Planning Calendar* at the end of this guide to lay out your plan for the year. Finally, connect with your club secretary to ensure your current email address is correct so you can receive monthly messages from Lions International with tools and resources that can help you achieve success.

## Responsibilities

Club membership chairpersons manage their membership growth by recruiting new members and helping to create a great club experience for current members. Responsibilities include the following:

### Actions for success

- **Collaborate** with your leadership chairperson, service chairperson and club president (the chairperson for the Global Action Team) on initiatives focused on leadership development, membership growth and expanding community service.
- **Support** member retention by creating a warm and welcoming club environment. Make members feel like they're an important part of your service and your club.
- **Develop** and lead a team focused on creating and implementing membership goals and action plans. Follow the Global Membership Approach process:
  - **Build a team**
  - **Build a vision**
  - **Build a plan**
  - **Build success**



- **Encourage** club members to invite new members and help create a positive club membership experience for all.
- **Ensure** new members are provided with a new member orientation in collaboration with the club leadership development chairperson (vice president).
- **Participate** in region, zone and district meetings and events.
- **Contact** prospective member leads as soon as you receive them.

## Top priorities for every club membership chairperson

1. Develop a membership growth plan.
2. Review the Just Ask! A Culture of Recruitment Guide with your club to help prepare them to identify and welcome new members.
3. Make a list of prospective members and follow up to ensure that invitations are being made to join the club.
4. Ensure new members receive orientation.
5. Help create a positive club atmosphere.
6. Ask your club to identify potential members, then repeat steps 1-5.
7. Promote the club at service projects and events by working with the club marketing chairperson.
8. Participate in zone and district meetings.
9. Collaborate within your club, zone and district.
10. Collaborate with your club marketing chairperson to create a Facebook page or build a club website using the e-clubhouse template available at [lionsclubs.org](https://lionsclubs.org).

## Measuring success

- Conduct at least one more community membership drive than the previous year.
- Increase the number of new members over the previous year.
- Contact a minimum of two former members about returning to the club.
- Increase total membership over the previous Lions year.
- Retain 85% of members.
- Hold a new member orientation and encourage new members to participate.



## Your role as club membership chairperson

As the membership chairperson, you will implement the Global Membership Approach process to revitalize membership and motivate current members. You should also continually look for ways to improve and evaluate your club's recruitment and member engagement strategies.



# Revitalize your club with new members

## Support and guidance

### Build your team

The best way to get started is by forming a membership-focused team to help you get the job done. Consider including the following club members:

- Last year's membership chairperson
- Next year's potential membership chairperson
- Any club members interested in recruitment or member satisfaction

This team can help you prioritize membership satisfaction and achieve growth in your club. By including the previous and future club membership chairpersons in your team, you're helping to ensure that membership efforts flow smoothly from year to year and that you have insight on what has and hasn't worked for your club.

### Global Action Team

The district Global Action Team is there to support you in your membership efforts. This team is your go-to point of contact if you have any questions or concerns about membership, so be sure you know who these members are and reach out to them when needed.

### Other Lions clubs

Clubs also benefit from other clubs by sharing their Global Membership Approach best practices. As a club membership chairperson, you can quickly increase member satisfaction and reach membership growth goals by utilizing the support network that has been established through the Global Action Team.

### Lions International

We gather and share best practices and success stories, so let us know what works in making your new members feel more welcome and celebrating the long-time members of your club! Email the Membership Division at [membership@lionsclubs.org](mailto:membership@lionsclubs.org).



# Membership recruitment

Every club needs members to achieve its service goals, and recruiting these members is everyone's responsibility. New members provide clubs with fresh ideas, new projects and additional ways to make a difference in your community.

Here are some ways you can kickstart your efforts.

- Review the *Just Ask! A Culture of Recruitment Guide* located at [lionsclubs.org/MembershipChair](https://lionsclubs.org/MembershipChair).
- Create a plan for your club's membership growth.
- Prepare your club to start your member recruitment by identifying why your club needs new members and what kind of members your club needs.
- Understand the different membership types and programs Lions International offers, and figure out which ones may apply to your club. Learn about the district and multiple district dues for different membership types.
- Encourage new member recruitment and promote award programs to your club members.
- Make sure new members have a valid email address to help them receive helpful communications from Lions International.
- Review the *New Member Orientation* guide and conduct sessions with new members to complement the New Member Experience emails they receive.
- Encourage participation in the Lions Mentoring Program.
- Promote membership during service events. Fun events that invite community members to participate are excellent recruitment tools.

## ➡ Did you know?

New members receive emails from Lions International designed to educate, inspire and encourage engagement in Lions activities. Share with us what your club is doing at the local level to help contribute to the overall success of Lions worldwide.

## ***Just Ask! A Culture of Recruitment Guide***

This helpful, step-by-step guide, available at [lionsclubs.org/MembershipChair](https://lionsclubs.org/MembershipChair), is designed to help your club recruit new members and effectively manage club growth. Although the concept is simple – just ask friends, family and community members to join – this guide will help you prepare an effective outreach plan by leading your club through the four-step Global Membership Approach process:

1. Build a team: Preparing your club
2. Build a vision: Creating your club's vision
3. Build a plan: Implementing your club's growth plan
4. Build success: Welcoming your new members



## Membership options

When members are invited to join your Lions club, share the international dues, programs and membership types with them so they can choose the one that best fits their situation.

The *Membership Opportunities Flyer*, available at [lionsclubs.org/MembershipChair](https://lionsclubs.org/MembershipChair) is a great resource to help you and your club learn about our current membership types.

## Expanding your membership

A club branch is an extension of your club, made up of five or more members. This is an excellent opportunity to expand your club's membership and get more people involved and engaged with Lions International — especially for those unable to attend meetings because of timing, distance or other reasons. Club branch members count toward your club's overall membership and service reporting. You can learn more about this creative way to expand your membership at [lionsclubs.org/Club-Branch](https://lionsclubs.org/Club-Branch).

## Tracking prospective members

Use the *Membership Recruiting Event* or *Invitation Report* at the end of this guide to track the number of participants at events, prospective member information, and notes or follow-up information. Submit this report to club officers each month to inform them of the club's recruiting efforts and successes.

## ➡ Did you know?

It is essential to prepare your club before you begin your recruiting efforts so you're ready to welcome and keep new members. Use the *Just Ask! Guide* to get prepared.



## Recruiting Wheel

The Recruiting Wheel is an effective way to develop lists of people who could be invited to join your club. Distribute this page at a regular meeting. For each category of the wheel, have an experienced Lion ask: “Who is the one?”

Example: Who is the one relative you feel would like to contribute to improving the community? Give your members a brief time to think about their choices and fill in the *Build a Lions Network Form* as thoroughly as possible.



\* May include but is not limited to elected officials, school principals, police and fire chiefs and hospital administrators.

\*\* May include but is not limited to doctors, accountants, dentists, lawyers and bankers.

Please see pages 16 to 22 in the *Just Ask! Guide* for examples of how to foster a culture of recruitment.



## Club Communication Wheel

The Communication Wheel is another method for identifying and listing ways to promote club activities and engage prospective members who may be invited to join your club. Distribute this page at a club meeting and have a member of your recruitment team, either the promoter\* or outreach coordinator\*\*, go over the engagement strategy with your club for each category on the wheel.



\*Promoter: Tech-savvy and creative members can create brochures, issue press releases, and update your website and social media networks.

\*\*Outreach coordinator: These are your Lions who are comfortable talking to new people about your club. Please encourage them to promote Lions Clubs International to your target group via community groups on social media, email, and community-based events to begin engaging with prospective new members.

# Motivate members

## Membership satisfaction

To ensure that your club remains healthy and vital, you must consider the experience and expectations of your members. If your club members feel that their time is well spent at club activities and they're building friendships, they will remain part of your club for a long time. That's why it is essential to keep members engaged by incorporating multiple member satisfaction strategies and resources into your meetings and service activities. These tools focus on club cooperation, member morale and running great meetings to keep members involved.

Here are some ways to get started:

- Create a plan for membership satisfaction and present it to the club's board of directors and your members for approval and support.
- Assist club officers in organizing a *Club Quality Initiative* to examine your community's needs, assess your current membership satisfaction and develop an action plan.
- Partner with your club's service committee to ensure service projects are meaningful to each member's humanitarian interests.
- Improve current club membership by conducting an Exceeding Expectation survey with your active members to identify your strengths and challenges.
- Promote membership awards programs to your club to recognize members for their efforts and achievements.

Remember, a positive member experience is the foundation for keeping members.

### ➡ Did you know?

There are several tools and resources online. Check out [lionsclubs.org/MembershipChair](https://lionsclubs.org/MembershipChair) for a variety of membership satisfaction resources to find what works best for your club.

## New member checklist

Use the following new member checklist to make sure new members feel welcomed and valued by your club:

- Have I introduced them to everyone in the club?
- Have I encouraged them to attend club events?
- Have I given them a new member orientation?

## Member Satisfaction Guide

The [Member Satisfaction Guide](https://lionsclubs.org/MembershipChair) is available at [lionsclubs.org/MembershipChair](https://lionsclubs.org/MembershipChair), along with the following resources referenced in the guide, to help ensure your members are having a great experience in your club:

- [Exceeding Expectations](#)
- [New Member Orientation](#)
- [Lions Mentoring Program](#)
- [Community Needs Assessment](#)

## Member Satisfaction Report

Use the Membership Satisfaction Report at the end of this guide to track the steps you're taking to increase your membership satisfaction. Submit this report to club officers monthly so they can see your progress.



# Awards and recognition

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Lions International offers membership awards and recognition opportunities to highlight the achievements of Lions and clubs. So be sure to share these opportunities with your Lions to encourage them to invite new members and keep current members happy.

- **Sponsor Certificate:** Lions who sponsor a new member anytime in the Lion year receive a certificate of sponsorship signed by our international president.
- **Membership Key Awards:** Lions earn their first membership key by inviting two new members and may earn up to 17 keys for member invitations.
- **Member Satisfaction Award:** Lions clubs that maintain 90% of their membership or reverse long-term membership loss in a fiscal year will receive the Member Satisfaction Banner Patch.
- **Chevron Awards:** Beginning at 10 years and continuing in 5-year increments, Lions are recognized with a Chevron Pin for their long-term service.

Finally, there may be special initiatives from our international president. Be sure that your email on file at Lions International is correct to receive updates on these initiatives.



## Membership Chairperson Planning Calendar

**JULY / AUGUST / SEPTEMBER**

- Create a Membership Development Plan that includes both retention and recruitment tactics.
- Identify key events in your community where you can recruit new members.
- Work with your club secretary to ensure that you have essential member milestones on your calendar to celebrate with your club.

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## OCTOBER / NOVEMBER / DECEMBER

- Connect with members who haven't been to a meeting or activity for a while.
- Conduct a membership survey using How are Your Ratings or another survey tool. Report findings to your club and create an action plan to improve member satisfaction.
- Work with your club secretary to ensure that your membership roster is current.

[illegible]

## Membership Chairperson Planning Calendar

**JANUARY / FEBRUARY / MARCH**

- Begin planning for Worldwide Induction Day to make sure your event in April is a success.
- Consider starting a club branch to give new members new ways to serve with you.

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## APRIL / MAY / JUNE

- Welcome new members to your club on Worldwide Induction Day.
- Celebrate success and note what worked well and what didn't to help the membership chair with planning for next year.
- Work with your club secretary to ensure your membership roster is current.

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## Club Membership Recruiting Event or Invitation Report

Club Name: \_\_\_\_\_ Event Date: \_\_\_\_\_

Event Type: ☐ Meeting ☐ Project ☐ Fundraiser ☐ Membership Drive ☐ Member Invitation

☐ Other: \_\_\_\_\_

**Description:** \_\_\_\_\_

\_\_\_\_\_

### Participants (if applicable)

Number of Lions: \_\_\_\_\_ Number of Non-Lions: \_\_\_\_\_ Total Participants: \_\_\_\_\_

### Prospective Members

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Notes/ Follow-Up: \_\_\_\_\_

\_\_\_\_\_

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Notes/ Follow-Up: \_\_\_\_\_

\_\_\_\_\_

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Notes/ Follow-Up: \_\_\_\_\_

\_\_\_\_\_

Comments: \_\_\_\_\_

\_\_\_\_\_

# Club Membership Satisfaction Report

**Club Name:** \_\_\_\_\_ **Month:** \_\_\_\_\_

The following initiatives have been completed to help ensure club members are satisfied.

- |  |                       |
|--|-----------------------|
| <input type="checkbox"/> Created, reviewed or modified a club satisfaction plan. | Date Completed: _____ |
| <input type="checkbox"/> Conducted a member questionnaire.                       | Date Completed: _____ |
| <input type="checkbox"/> Conducted a former member questionnaire.                | Date Completed: _____ |
| <input type="checkbox"/> Completed the Club Quality Initiative.                  | Date Completed: _____ |
| <input type="checkbox"/> Conducted a Community Needs Assessment.                 | Date Completed: _____ |
| <input type="checkbox"/> Conducted a How Are Your Ratings? Survey.               | Date Completed: _____ |
| <input type="checkbox"/> Addressed a reason members leave.                       | Date Completed: _____ |
| <input type="checkbox"/> Other.  | Date Completed: _____ |

**Description:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**What was learned?** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Comments:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_







# GLOBAL ACTION TEAM



## Global Service Team (GST) Club Service Chairperson

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<b>Term</b>	One year; elected position as a club officer and member of the board of directors.
<b>Position Overview</b>	<p>As the GST club service chairperson, you are responsible for implementing impactful service and fundraising projects, increasing service project engagement of members, and elevating awareness of Lions' collective impact in fulfilling global humanitarian needs. Your actions support your club's success in <i>MISSION 1.5</i> membership growth, which will expand opportunities for future service.</p>
<b>Actions for Success</b>	<ul style="list-style-type: none"><li>• Commits to the organization-wide goal and objectives of <i>MISSION 1.5</i>, which includes achieving defined regional membership targets.</li><li>• Actively supports member recruitment, retention and club development, through impactful service project planning and implementation.</li><li>• Collaborates with the club membership chairperson and other club committees to promote membership opportunities to non-Lions during service projects.</li><li>• Inputs and tracks club service data, including reporting service activities to Lions Clubs International. Reports progress during check in calls with zone chairperson.</li><li>• Develops and leads a service committee to create and implement service goals and action plans.</li><li>• Attends the district governor's advisory committee meeting of the zone in which this club is located when appropriate.</li><li>• Collaborates with their team to conduct relevant <i>MISSION 1.5</i> seminars, events, and projects during club and zone meetings, conventions and district trainings.</li></ul>
<b>Measuring Success</b>	<p>At the end of each Lion year:</p> <ul style="list-style-type: none"><li>• Supports positive net membership growth as defined by <i>MISSION 1.5</i> including sponsoring at least one new member.</li><li>• Increases member satisfaction in club service project and fundraising events through member growth in service project participation.</li><li>• Increases service project implementation and reporting over the previous Lion year.</li><li>• Inputs at least one service project or fundraising event through the Lion Portal.</li><li>• Implements at least one service project or fundraising event in tandem with local Leo club or youth service organization.</li></ul>
<b>Recommended Qualifications</b>	<ul style="list-style-type: none"><li>• Passionate about Lions and is invested in the association's future.</li><li>• Experience in leading and developing service activities within the last five years.</li><li>• Strong project or event management, public speaking, and presentation skills</li><li>• Familiar with LCIF programs, partnerships and grants.</li><li>• Able to use technology (Email, Microsoft Office, Lion Portal, LCI website, social media).</li></ul>
<b>Reporting</b>	<ul style="list-style-type: none"><li>• The GST club service chairperson reports to the GST district coordinator.</li><li>• The GST club service chairperson, GMT club membership chairperson, and the GLT club leadership development chairperson report to the Global Action Team chairperson (club president).</li></ul>





# Club Service Chairperson

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e-Book



**Lions  
International**



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## **Welcome to the Club Service Chairperson e-Book!**

This guide is designed to support you in your role as the service chairperson for your club. It contains tools and resources for you to be successful not only in your individual role, but as a cohesive team member on the Global Action Team, with your fellow club members and officers.

It's easy to navigate the e-Book. Just click on the various sections contained in the Table of Contents to jump to each task you perform to fulfill your role. From there, you will find useful information and hyperlinks that take you directly to tools, resources and documents that will empower you to explore new ways to implement impactful service activities in your local community.

## **Prepare to Lead; Prepare to Succeed**

As the club service chairperson, you serve in the critical role of facilitating the development and implementation of your club service goals. You help your fellow club members assess community needs, plan and implement service activities, and report and celebrate the impact of your service. You also collaborate with your club membership chairperson to involve potential new members for your club during local service activities. The service your club provides to your community brings an opportunity to attract new members that share a passion to serve the needs of their local community.

Spend time learning about the role, attending training and planning to fulfill the responsibilities of your position prior to the start of your term in office. You will better support your club in providing premier service to your community.

### **Your Responsibilities as the Club Service Chairperson**

In this club officer role, your responsibilities are as follows:

- Serve as a key member of the club's Global Action Team as the club service chairperson
- Collaborate with the District Global Service Coordinator, Club LCIF Coordinator, district leaders, members of the club's service committee and others to develop and communicate annual service goals and action plans. Goals and action plans should address current community needs and/or LCI's global causes and can be comprised of advocacy and fundraising in addition to direct service to beneficiaries.
- Lead the service committee to implement the club's service action plans in order to achieve the club's service goals.
- Incorporate opportunities for local youth and Leos to engage in all aspects of service activities, including goal setting, implementation, project evaluation and reporting.
- Report service activities to Lions Clubs International.
- Serve as a club resource on current community needs by monitoring the service activities of other service clubs, developing community partnerships to expand service, and utilizing tools and resources offered by Lions Clubs International and Lions Clubs International Foundation.
- Increase member satisfaction by encouraging participation and engagement in service projects.
- Collaborate with the club membership chairperson and other club committees to promote membership opportunities to non-Lions during service projects.
- Attend the district governor's advisory committee meeting of the zone in which this club is located when appropriate.

## **Participate in Training Offered by Your District**

Contact your district and/or multiple district Global Action Team Coordinators for local training opportunities.

## **The First 30 Days in Your Position**

The beginning of the fiscal year is a crucial time to prepare for successful service leadership. This includes reviewing the results of previous club assessments of community needs and previously implemented service activities. You may wish to complete a new [Club and Community Needs Assessment](#) since a community's needs are ever-changing. Another important task is to set up a system to retain club service activity records. You will also be preparing reports for the club board of directors, including revenues and expenses from fundraisers, service committee reports and decisions and actions taken by the club and board of directors in regards to club service.

## **Establish a Service Activities Calendar**

To keep club members engaged and foster meaningful involvement, a club service calendar should be planned in collaboration with club leaders.

Create an annual event calendar which is continually updated, publicized and readily available for the club members. A *Lions Club Service Calendar*, with an idea for every month, is available from the [Club Service Chairperson webpage](#) to help you get started. You may also want to include key dates from the [Lions International Calendar](#) and any district or multiple district service activities in your area.

In addition to sharing the service calendar with your club, consider sharing the event calendar with community leaders and other service organizations within the community.

With your calendar established, you can recruit service project chairpersons and follow-up on their progress. Your calendar will also assist you in preparing service activity reports for the quarterly meetings of the District Governor Advisory Board Committee (zone meetings). Be ready to celebrate your successes and share best practices!

## **Service Reporting**

Lions and Leos inform, inspire and grow our membership and legacy of humanitarian service by sharing our impact through service reporting.

Reporting your club's service is the responsibility of the Club Service Chairperson, although there are additional leadership positions within the club that are also able to report service on behalf of the club.

Visit the Service Reporting [page](#) to discover:

- The benefits of service reporting.
- Awards for clubs that report service.
- How and when to report service.
- Who can report service.
- How to measure service impact.
- How districts can help clubs report service.
- Where to go for help.

Remember that club meetings, fundraisers, and donations are all considered service, and can be reported as well as service projects!

[Back to Table of Contents](#)



## Our Global Causes & Service Programs

Your club develops its own service projects to meet the needs in your community. In addition to the many ways Lions and Leos serve locally, we also work together to support the following global causes, which present significant challenges to humanity.

- [Childhood Cancer](#) – We are working to provide support for the needs of children and families affected by childhood cancer.

Explore our resources (live in next Lion year) designed to help Lions and Leos support those impacted by childhood cancer across three areas of service:

1. *Patient and Family Support*: Ensure patients and their families impacted by childhood cancer are adequately supported, and to address the most common barriers to obtaining necessary treatment.
2. *Organization or Facility Assistance*: Provide support to childhood cancer organizations or facilities.
3. *Childhood Cancer Awareness, Education and Advocacy*: Raise awareness of the impact of childhood cancer educate your community members and create positive change.

- [Diabetes](#) – We are working to provide support to reduce the prevalence of diabetes and improve quality of life for those living with diabetes.

Explore our programs designed to help you and your club lead diabetes efforts in your community:

1. [Strides for Diabetes Awareness](#): Strides events involve fun physical activity to help promote diabetes awareness and management.
2. [Type 2 Diabetes Screening](#): Type 2 diabetes screening events are important way to help your community understand their diabetes risk and take steps towards prevention.
3. [Diabetes Peer Support Groups](#): Diabetes peer support groups encourage the exchange of support of all types among community members living with diabetes.
4. [Diabetes Camps](#): Diabetes camps are designed to help enhance the quality of life for young people living with diabetes by providing diabetes management skills.

- [Disaster Relief](#) – We are working to meet immediate needs and provide long-term support for communities devastated by natural disasters, including disaster preparedness, emergency response, and community recovery and reconstruction.
- [Environment](#) – We are working to protect the environment to create healthier communities and a more sustainable world.

Explore our resources designed to help Lions and Leos protect the environment across five areas of service:

1. [Tree Planting and Tree Care](#): Improve your community through the planting of locally appropriate tree seedlings or saplings, contributing to cleaner air and a healthier environment.

2. [\*Environmental Cleanup and Restoration\*](#): Protect nature and habitats by cleaning debris and shielding pollutants from harming ecosystems marine life and the community.
  3. [\*Recycling and Waste Management\*](#): Conserve resources and reduce waste to minimize adverse impacts on sustainability.
  4. [\*Clean Water and Sanitation\*](#): Ensure safe water and adequate sanitation for all, promoting better health outcomes around the world.
  5. [\*Environmental Awareness, Education and Advocacy\*](#): Raise awareness of the importance of protecting the environment, educate your community members, and create positive change.
- [\*Humanitarian\*](#) – We are working to identify the world’s most crucial needs and provide humanitarian aid where it’s needed most, including blood drives, refugee resettlement, and care for the elderly and disabled.
  - [\*Hunger\*](#) – We are working to improve food security and access to nutritious food to help alleviate hunger.

Explore our resources (live next Lion year) designed to help Lions and Leos alleviate hunger across five areas of service:

1. *Food Collection, Preparation, and Distribution*: Enhance access to food for community members by creating avenues for food collection, preparation, and distribution.
  2. *Community Feeding Event*: Promote wellness and nutrition by providing meals and community engagement for local families.
  3. *Agricultural Development and Support*: Provide sustainable access to food through the development and support of community agriculture systems.
  4. *Hunger Initiatives for Women and Children*: Advance food equity by empowering women and children through hunger-related service.
  5. *Hunger and Nutrition Awareness, Education, and Advocacy*: Promote hunger and nutrition awareness around the world through education and advocacy.
- [\*Vision\*](#) – We are working to help prevent avoidable blindness and improve quality of life for people who are blind or visually impaired.

Explore our programs designed to help you and your club lead vision efforts on your community:

1. *Vision Screening*: Eighty percent of all visual impairment can be prevented or cured. The first step to prevention is awareness. The second is early detection through vision screening. Around the world, Lions partner with medical professionals and community leaders to screen young children, primary school students, and adults to identify those at risk for vision loss.
  - [\*Vision Screening for Adults Project Planner\*](#)
  - [\*Vision Screening for Children Service Project Planner\*](#)
2. [\*Lions KidSight\*](#): Lions KidSight provides vision screening and referral services to youth starting at the age of 6 months. These screening services are vital in ensuring youth receive early intervention and necessary eye care.

3. [Lions Eye Banks](#): Eye banks recover, evaluate, store and distribute human eye tissue for vision restoration, research and education. Eye surgeons rely on eye banks to supply them with tissue for sight-saving procedures. A Lions eye bank is sponsored by a Lions club, district or multiple district and has established working relationship with a medical facility.
  4. [Eyeglass Recycling](#): Refractive errors can be easily corrected with eyeglasses, yet millions living in low and middle-income countries lack access to basic eye care services. Lions have recognized the urgent need for corrective lenses and collect usable glasses in their communities to support the Lions Recycle for Sight Program.
- [Youth](#) – We are working to provide young people with the support they need to make positive choices, lead healthy and productive lives, and become the next great generation of service leaders. Activities include Youth Camps and Exchange, Lions Quest, Cub Program, and our Peace Poster and Essay contests.
    1. [Youth Camps and Exchange](#): Youth Camps and Exchange (YCE) has programs all around the world and is designed for young people between the ages of 15 and 22 to create and foster a spirit of understanding among peoples of the world. The YCE Program is comprised of two major parts: international exchanges and international camps.

## **The Service Journey, Service Toolkit, and GST Toolbox**

The [Service Journey](#) is an approach to loving and serving well. To making a real difference people can see and feel. It encompasses four simple phases: Learn, Discover, Act and Celebrate. We love these words because they transcend organizational formulas. They have no borders. They are the essence of Lions and Leos. If the past 100 years have taught us anything, it's that as we serve, we grow. And we were never meant to stop. Service is our journey. Let's explore it together.

More information about *The Service Journey* can be found in the Lions Learning Center by searching for "Service Journey". This course explores *The Service Journey* phases in an interactive way, to better equip Lions and Leos with resources to successfully serve their communities, regions and the world!

## **The Service Toolkit**

Passionate about service but unsure where to begin? Searching for new insight to inspire your club? You've come to the right place. The [Service Toolkit](#) features resources designed to help you assess, position, and activate your club for greater impact.

- Club and Community Needs Assessment – Looking to calibrate your service for maximum impact? This tool is a great place to start, helping clubs apply their unique strengths and motivation to the needs and opportunities within their local community.
- Developing Local Partnerships – We can achieve more when we work together. This guide helps clubs evaluate their strengths, identify their needs, and connect with likeminded organizations in the community for potential partnerships.
- Fundraising Guide – Raising funds is a valuable strategy for bringing a community together and increasing the impact of service. This guide helps clubs plan two common types of fundraising campaigns: online fundraisers and event fundraisers.

## **GST Toolbox**

The Global Service Team (GST) helps clubs identify resources and use best practices to improve their projects and, by extension, their impact. Quality service projects increase member satisfaction and help attract new members who are looking to serve. The GST champions the service programs, resources and grants of Lions International, empowering Lions and Leos around the world to maximize their service impact. Visit the [GST Toolbox](#) for links to more resources and information.

## **Service Project Planners**

[Service Project Planners](#) – are designed to help clubs begin or continue service that supports our global causes. Each planner includes a project overview as well as worksheets to help plan for tasks, volunteers, budget and impact.

## **Advocacy**

### **Lions Advocacy**

Lions and Leos listen to the needs of their communities and use their voices to speak out on behalf of the people they serve. Clubs around the world participate in advocacy through community awareness and education, legislation and public policy, events and partnerships. As community leaders, Lions and Leos can raise awareness of the causes they care about, educate their community members on important issues, and create positive change.

### **Lions Advocacy Toolkit**

Visit the [Advocacy Toolkit](#) to discover:

- What is advocacy?
- Lions advocacy strategy and programs.
- Country-specific advocacy resources.
- Lions International's relationship with the United Nations.
- Lions advocacy history.
- Advocacy calendar.
- Celebrate and share.

### **Lions Advocacy Events**

Visit the [Lions Advocacy Calendar](#) for information on advocacy events including Lions Day with the United Nations, Lions Day on Capitol Hill in Washington DC, USA, and other advocacy days being planned around the world.

## **Service Awards**

The [Kindness Matters Service Award](#): This prestigious award is given annually to a handful of Lions and Leo clubs for performing an outstanding service project in one of our global cause areas. Nominated at the club level, the Kindness Matters Service Award is a challenge for Lions and Leos to develop exceptionally innovative and creative service projects with the aim of leaving a positive impact in their communities.

Visit the [webpage](#) to learn about award criteria, how to be nominated, and the nomination timeline.

## **Lions Clubs International Foundation Grants**

We encourage you to explore the different [grant types](#) and resources withing this online toolkit to find out if there's a grant that's right for your club, district or multiple district now, or in the future!

### **Monthly Tasks**

As club service chairperson, you will monitor club service activities at different stages of planning or completion. You will prepare for meetings, keep meeting minutes, follow-up and organize service activity project planning documents.

#### **Prepare for Meetings**

Be ready to share announcements and sign-up sheets at club meeting for upcoming service activities. Consider how best to also invite community volunteers to serve with you.

Prepare service activity reports and future activity promotional items for distribution at general membership and board meetings as requested by the club president.

#### **Maintaining Service Activities**

A well-maintained project book is helpful for service activity chairpersons; providing step-by-step tasks from planning to follow-up for major service activities. This also eases the task for new incoming service activity chairpersons by providing a foundation for ensuring continuing success for your club's service activities.

Always provide an ongoing update of all service activities for the general membership, committees and board meetings.

Collect, distribute and retain service committee reports for permanent meeting records.

Maintain necessary financial documentation for the club treasurer to provide if needed to local taxing or registering bodies.

Work with the club secretary or treasurer to obtain [insurance certificates](#) as required for activities.

At each meeting, record members who volunteer to participate in club and or community service activities. This will allow the project chairperson to know who will be participating and allow for non-members to be contacted about joining Lions.

### **Quarterly Meetings**

#### **Zone Meetings**

As club service chairperson, you have a responsibility to participate as one of the key officers involved in at least one of the quarterly zone meetings each year. Zones consist of a group of 4 to 8 surrounding area clubs. The club officers from these clubs meet on a quarterly basis, usually during the first three quarters of the fiscal year, led by your zone chairperson.

The Model District Governor Advisory Committee Meeting – This [guide](#) assists both the zone chairperson and club officers in understanding what to expect at the quarterly zone meetings. Often times the zone chairperson asks a club to report regarding service, membership, leadership or other events. Each meeting may have a specific focus and provides an opportunity for club officers to meet and learn from each other. Be ready to share your club’s plan for service for the year and best practices with your fellow club service chairpersons.

## **Annual Events**

### **Celebrate Community**

Celebrate Community is a weeklong initiative to promote joint community service among members of Lions International, Rotary International, Kiwanis International and Optimist International. The purpose is to elevate the collective social impact of our organizations and promote a spirit of worldwide volunteer collaboration. The event takes place during the second week in September. Club Service Chairpersons are encouraged to reach out to a local service organization and collaborate on hosting a project. The event is primarily promoted through a Facebook Event [page](#).

### **District/Multiple District Conventions**

Completing a service project in the community where your district convention is being held is a great way to collaborate with your fellow club service chairpersons and the district Global Action Team. Together you can make a positive difference in that community and let everyone know that Lions are there “to serve.”

### **The International Convention**

This annual world-wide celebration of Lions service culminates with multiple service activities being implemented in the host city. This is also a great event at which you can explore new ideas and best practices to bring back to your club; to improve the local service you provide for your community’s greatest needs.

Convention service projects provide hands-on service opportunities that meet local needs and allow convention attendees to interact with Lion and Leo friends from around the world. Project registration opens in February on the convention registration site.

### **Year-end Check List**

To provide recognition to club members that contributed to the success of the service activities to the club, appreciation plaques, awards and Lions branded recognition products are available in the [Lions Shop](#).

### **Prepare Documents and Orient the Incoming Club Service Chairperson**

A notebook is often used to retain documentation of service activities project management, critical “check lists” of tasks and results of fundraisers or total participation in an event. If this is maintained on a monthly basis, it will be ready to serve as a reference for the incoming club service chairperson. If the club chooses to retain files electronically, all items that pertain to the documentation of service activities committee meetings should be included.

## **Legalities and Technicalities**

[Use of Funds Guidelines](#) - This provides guidance on the appropriate use of public funds or administrative funds for clubs and districts.

[General Liability Insurance Program](#) - The International Association of Lions Clubs has a program of Commercial General Liability Insurance that covers Lions on a worldwide basis. All Clubs and Districts are automatically insured.

- [Certificates of Insurance](#) - In order to expedite the certificate issuance process, you now have the ability to create certificates of insurance on your own.
- [Supplemental Insurance](#) - In addition to the automatic coverage mentioned above, Lions Clubs International now offers Supplemental Insurance Coverage for Clubs and Districts in the United States including Directors & Officers Liability, Crime / Fidelity, Additional Liability Insurance and Accident Insurance.

[Lions Trademark Overview](#) - This guideline is to help you understand the appropriate use of the Lions emblem and trademarks, and when approval is required.

[Lions Clubs International and Lions Clubs International Foundation Privacy Policy](#) - Lions Clubs International and LCIF recognize the importance of protecting the private information of our members.



## **Lions International**

Service Activities Division  
300 W. 22<sup>nd</sup> Street  
Oak Brook, IL 60523-8842, USA  
[www.lionsclubs.org](http://www.lionsclubs.org)  
email: [serviceactivities@lionsclubs.org](mailto:serviceactivities@lionsclubs.org)





## Club Marketing Chairperson Role Description

The responsibilities for this position\* may include:

- (a) Develop and implement an annual marketing plan in collaboration with the club membership chair. The plan should consider internal and external audiences, including club members, social media news media, supporters/sponsors and potential new members.
- (b) Collaborate directly with the Global Action Team to stay connected to all membership, leadership, and service programs, projects, and events.
- (c) Understand global brand guidelines and support proper use of brand materials in club events and service projects.
- (d) Promote the work of the club on social media. Develop a social media post calendar to follow club service, community involvement, and membership activities.
- (e) Work closely with the club membership chairperson to target and reach out to new potential club members.
- (f) Develop club marketing and public relations talking points for club members. Use word of mouth marketing tactics to promote the club and recruit new members.
- (g) Working with club leadership, submit marketing award application for consideration for the Lions International Marketing Award.
- (h) Motivate members to be brand ambassadors. Encourage members to take photos, share on social media, wear brand apparel, and share Lions messages during community involvement opportunities.
- (i) Publicize club activities, including service projects, fundraisers, donations, Lions Clubs International sponsored contests and other newsworthy accomplishments both internally and externally via the news media, social media, and other effective means.
- (j) Assist the club president in communicating information from the district, multiple district and international headquarters with the club members.
- (k) Attend the district governor's advisory committee meeting of the zone in which this club is located when appropriate.
- (l) Participate in meetings held by the district marketing chairperson.

*\*Description taken from Section 9 of the International Association of Lions Clubs Standard Club Constitution and By-Laws*





# Marketing Communications Chairperson Guide

## Get Ready for Your Role

As the marketing communications chairperson, you play a dynamic lead role in your club. In this exciting position, you'll inspire and motivate new and current members, increase your club's visibility in the community and increase the impact of your projects and membership initiatives.

Get ready to meet new people and use your creativity to keep your community informed and engaged in all the great things your club is doing.

## Three Steps to Success

No one knows your club better than you. Here are three ways you can promote the key activities of your club.

1

### Shine a light on your service

Lions are built to serve. Be sure to let the community know about your service projects, fundraisers and community events. This will help people understand who you are, what you do, and why they should join you in service.



#### QUICK TIP

- ▶ When planning an event, think about how you'll promote it before, during and after the event.

2

### Tell your stories

Lions have the greatest stories on earth. Storytelling is a powerful way to help people understand your club and all the good you are doing for those in need. Authentic human experiences help people connect on an emotional level and inspire change.



#### QUICK TIP

- ▶ Great photos get attention, so take lots of photos of Lions serving and smiling. Get close when you're photographing for the best images.

3

### Promote your membership events

Your club can do more good with more members. Promoting membership events to the community is a great way to make sure that caring men and women show up at your events.



#### QUICK TIP


- ▶ Don't forget that every service project and club event is an opportunity to find new members.

## Engage Your Community with Facebook

There are a lot of great social media platforms that can help you promote your club, but Facebook is the biggest. If your club doesn't have a Facebook page, now is the perfect time to create one! It's a great way to promote projects and events, and share photos and connect with members, potential members and partners.


### Create Facebook “Events” for your projects

Facebook allows you to create special “Event” pages that can help you raise awareness of a project, invite friends and family, and provide updates to those who RSVP.

 **QUICK TIP** ▶ Include keywords in your Event title and description so that Facebook users can find it easily when searching for events in your area.


### Post photos and stories

Don't just tell people what you're doing—show them. Post photos of your events, your service projects and your members so people can see your service in action.

 **QUICK TIP** ▶ Quotes and testimonials from the beneficiaries of a service project are a powerful way to show how you're making a real difference in the lives of the people you serve.

### Build your community

Use Facebook as a networking tool to connect with your community. Extend your reach by engaging with partner organizations and local businesses. Invite members to like your page, and encourage them to share posts to their personal profiles. Use messages and comments to communicate directly with potential members. Build your club's brand as a difference-maker in the community.

 **QUICK TIP** ▶ Make social media a team effort! Assign multiple admins and editors to your Facebook page so others can access and collaborate.





## Shine a Spotlight on Your Club with Public Relations

Public relations (PR) includes a lot of things, both big and small. Working with traditional media outlets is a big part of PR, but it also includes publicizing the work your club is doing, and the conversations you have with people in the community.

Here are some simple PR strategies that can help you increase your visibility in the community, and show people that your club is not just vital, but also worth joining.

### Leverage your local media

Newspapers, TV, radio and bloggers are always looking for good news. Identify the key media in your community, and try to find the bloggers and reporters who cover local projects like yours. Let them know when you're going to host a project or event in case they want to cover it, and send them photos, outcomes and stories after the event so they can turn it into a story.

### Meet with local officials

Community influencers can help you spread the word about your club, so take time to get to know your local government officials, such as your mayor, trustees and chamber of commerce members. Let them know what your club is doing in the community, and enlist their help in promoting your club. Keep them updated on club activities, and try to attend some of their meetings.

### Connect with local businesses

There's nothing quite like talking to people to help get the word out. So talk to local business owners and managers, and tell them how your club is benefiting the community. They may be willing to sponsor a club event, or allow you to leave flyers in their businesses.

#### QUICK TIP

- ▶ Many media outlets use social media to find story leads, so stay active on social media to help get the media's attention.



## Leverage the Power of the Lions Brand

The Lions brand is one of the most recognized in the world. It helps define who we are. Here are some ways that you can leverage the Lions brand to enhance your own.

### Use marketing materials to get the community's attention

Flyers, ads and handouts help get people to your projects and membership events. Be sure to include your contact information and the Lions logo on your materials. Post flyers and posters in public places and local businesses, and be sure to have materials on hand to give to potential Lions who attend your events to help recruit new members.

### Wear Lions gear to show your pride

Encourage members to wear their Lions gear while serving in the community. This is one of the most powerful ways to promote the Lions brand.

### Be a brand ambassador—everywhere

As the marketing communications chairperson, you are the club's brand ambassador. But it's important to remind your members that each one is also a brand ambassador who represents your club. So be sure that members share the impact, pride and joy of being a Lion with others.

### Lionsclubs.org is your place for marketing resources

Get logos, brand guidelines, videos, social media guides and everything else you'll need to succeed at **lionsclubs.org/marketing!**



## QUICK TIPS

► **Promote all major club events.** This includes before, during (on social media) and after.

**A little planning goes a long way.** Think about what you want to accomplish, who you want to reach, and the best way to do both. Set some realistic goals to stay on track.

**Collaborate with key club members.** Work closely with your membership chairperson and service chairperson to help promote projects, events and success stories.

**Keep your club posted on your progress.** Report your efforts at club meetings, and explain how your club benefits from good public relations and marketing.

**Most of all, have fun!**



**Lions Clubs International**

**[lionsclubs.org/marketing](https://lionsclubs.org/marketing)**

# GLOBAL ACTION TEAM



## Global Leadership Team (GLT) Club Leadership Development Chairperson

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### Term

One year automatically fulfilled by the current club first vice president.

### Position Overview

The club first vice president is the GLT club leadership development chairperson. As GLT club leadership development chairperson, you ensure that members develop the skills needed to be effective leaders, and that your club has strong leadership to serve your community and the world. Your actions define the pathway for your club to ensure its success in executing *MISSION 1.5* membership growth plan implementation, and achievement of goals, as established.

### Actions for Success

- Commits to the organization-wide goal and objectives of *MISSION 1.5*, which includes achieving defined regional membership targets.
- Actively supports member recruitment by highlighting the various leadership skill advancing courses Lions International offers.
- Inputs and tracks club leadership development data. Reports progress and challenges during check in calls with zone chairperson.
- Actively supports retention by ensuring new members are provided with an effective orientation so members understand how the club operates within its district, multiple district and Lions International, with the support of the club membership chairperson.
- Ensures that all current and/or incoming club officers attend training offered by the district and/or via the Lions Learning Center (LLC).
- Identifies potential new leaders and encourages their development by promoting relevant training opportunities offered by the district, multiple district and Lions International.
- Collaborates with their team to conduct relevant *MISSION 1.5* seminars, events, and projects during club and zone meetings, conventions and district trainings.

### Measuring Success

At the end of each Lion year:

- Supports club net membership growth as defined by *MISSION 1.5* including sponsoring at least one new member.
- Ensures that incoming club officers participate in club officer training.
- Increases the total number of club members participating in leadership development training events by 10%.
- Ensures that new members participate in a timely new member orientation.

### Recommended Qualifications

- Passionate about Lions and is invested in the association's future.
- Leads by example, actively participating in leadership development programs.
- Strong project or event management, public speaking, and presentation skills
- Able to use technology (Email, Microsoft Office, Lion Portal, LCI website, social media).

### Reporting

- The GLT club leadership development chairperson reports to the GLT district coordinator.
- The GLT club leadership development chairperson, GMT club membership chairperson and GST club service chairperson report to the Global Action Team chairperson (club president).