



**Lions Clubs International**

## **Certified Guiding Lion Program**

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Empowerment is  
the key to success!



“Leadership is more than service,  
it is enabling others to be more productive.”





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*“Leadership is more than service, it is enabling others to be more productive.”*

While all Lions are welcome to take the course, it is recommended as a foundation to anyone who will work with new or existing clubs or serve (or plan to serve) in a leadership position. Upon completion of the course, you will become a Certified Guiding Lion! While the course may be valuable to any Lion, having the experience of a club president will enhance your success in guiding a new or existing club.

## Certified Guiding Lion Course Objectives

The Guiding Lion Program is designed to assist clubs that are newly chartered, established or are rebuilding. Guiding Lions are assigned for a two-year term by the district governor in consultation with the sponsoring or established club president. Guiding Lions are limited to serving no more than two new clubs at any point in time.

Even if you are an experienced Guiding Lion, you will benefit from this course because it provides the most comprehensive overview available of the roles and responsibilities of a Guiding Lion.

The Certified Guiding Lion Course will help you:

1. Understand your role as a Guiding Lion
2. Help you develop a plan to guide the club to become self-sufficient and strong
3. Provide tools to help the club officers manage their club
4. Establish a system to track development over the course of your term

### Tips

To help you become an effective advisor, it is suggested that the course be completed before you begin your term as a Guiding Lion or soon after your appointment.

Successfully completing this course will certify you for three years. At the end of the three years, you will be required to recertify. Please also note that you do not need to be certified to be assigned to a club as a Guiding Lion.

## Program Design

This course is offered two ways:

First Option: As a correspondence style course that allows you to learn at your own pace.

Second Option: In a classroom, which will allow you to exchange ideas with other participants. In all cases, you will be asked to complete the exercises on your own.

***Completing the course on your own – Self Study***, allows you adequate time to review the material and resources available as noted in this guide. The course will usually take approximately six to eight hours to complete. Seek additional information and guidance from the district governor and other knowledgeable Lions so you have a complete understanding of the support that is available. This provides an opportunity for these key leaders to provide additional information and help you to master areas that you might need to develop further. Once your district governor has reviewed your workbook and signed the completion form, send the form to Lions Clubs International so that a Certified Guiding Lion certificate can be sent to you.

***Participating in a classroom delivered course***, complete this workbook prior to attending the course. Allow yourself a minimum of six hours to complete the guide and, if possible, more time so you are well acquainted with the material. This will allow you to contribute more during classroom discussions and gain a more thorough understanding of the position. The time you put into preparing for the role for Guiding lion will make you a more confident and effective leader.

### 6 Elements of Club Success

1. The club members have conducted service projects that are meaningful to them.
2. The club has achieved a net growth in membership and involves new members in activities quickly.
3. The club communicates effectively with the members and the public.
4. Club events are held regularly and are meaningful and positive.
5. Club officers participate in zone and district leadership training.
6. The club is in good standing and reports regularly.

## Course Organization

### Section I. Skills of a Successful Guiding Lion

This section focuses on the leadership skills needed to be an effective Guiding Lion and helps you identify areas that you can develop further to make you a more effective leader.

### Section II. Get off to a Good Start – Become an Information Expert

This section helps you prepare for serving as a Guiding Lion by leading you through the current materials and training available from LCI.

This section focuses on:

1. Club Officer Resources – Materials specifically designed for club officers
2. Club Quality Programs – Materials and programs designed to strengthen the club
3. MyLCI – Is a customized dashboard for club officers to both report information and download information for critical club operations.

### Section III. Develop a Club Officer Mentor Team

This section helps you identify Lions who can assist the club as a Club Officer Mentor and provides an outline for the mentor to follow to provide job specific training.

### Section IV. Design Club Officer Training

This section outlines a general plan for club officer training that can be adapted for your use in your geographical area. The program outline includes an introduction to LCI and then moves on to identifying and implementing service projects, how to conduct meaningful meetings and strategies for continuous improvement.

### Section V. Assessing Club Needs

This section helps you identify the needs of the club so that resources and support can be effectively utilized.

### Section VI. Guiding Lion Resources

This section includes a description of the reports available to the Guiding Lion to help track the development of the club.

## Receiving the Presidential Certified Guiding Lion Award

To receive the Presidential Certified Guiding Lion Award, it requires that you complete:

### The Club

- Is in good standing with Lions Clubs International
- Had a net membership growth and a minimum of 20 members at the close of the Guiding Lion's two-year term
- Reported new service and fundraising projects and was encouraged to donate to LCIF
- Participated in district activities (including zone meetings)
- Club officers confirmed the Guiding Lion supported the club's development

### The Guiding Lion

- Submitted quarterly reports to Lions Clubs International and the district governor for two years
- Completed the Certified Guiding Lion Course Prior to the end of their two-year assignment
- Attended a majority of the club's general and board meetings
- Submitted their final report to Lions Clubs International and their district governor



## Section I: Skills of a Successful Guiding Lion

**Administrator. Motivator. Team Builder. Communicator. Listener.** A successful Guiding Lion serves many roles. Some of these skills may come naturally to you; some of them you may need to fully develop. Building these skills will not only help you with your responsibilities, but they will also help you personally and professionally.

**Empowerment is the key to success!** Each club was founded by Lions who had a dream and wanted to make a difference. As a Guiding Lion you may have the opportunity to help show them how they can reach their dreams as a member of a Lions club. Don't try to change their dreams, support them. **Too often, overzealous leaders encourage clubs to support projects that are little or no interest to the members of the club.** Be sure to encourage clubs to follow their dreams and encourage other Lion leaders to support the club's decision. Do not allow area leaders to pressure the club into supporting projects that divert funds and energy away from the club's goals.

**Motivator:** Attitude is infectious. Motivate new members by being positive. Inspire them even further by helping them realize the responsibilities, benefits and satisfaction that come from Lions membership.

**Trainer:** A big part of your job will be to show club leaders how to effectively manage their club and to lead the club in a positive direction. Helping both club officers and members learn about our association is very important responsibility. Take some time before beginning the training to reacquaint yourself with the fundamentals of LCI, your multiple district, district and your local club so you can incorporate the information into your club officer training.

**Communicator:** Good communication skills will improve your effectiveness. Take the time to listen to what others are saying. Learn how to moderate discussions and help people solve disputes. Encourage two-way communication between members in a positive and proactive manner.

**Observer:** While you are trying to nurture the club, recognize that each member will have different skills, abilities and experience. Use individual strengths to the club's advantage.

**Planner and Goal Setter:** Help the group work together to define and set measurable goals and action plans to reach the defined goals. Be sure that the goals that are set are meaningful to the club and its members.

**Team Builder:** Help new club members learn how to function as a group; i.e., to respect the opinions of individuals while working together to decide what is best for the club as a whole. This skill will be critical for the club as it moves forward.

**Administrator:** Being organized will help you with the task of filing reports and assisting the club, and it will help build your own confidence. As a role model, do your part to portray Lion leaders as organized, knowledgeable and professional.

**Advisor:** Share your insights, knowledge and experience with club leaders, while still allowing them to make decisions on their own.

**Liaison:** Help keep the lines of communication open between the new clubs and the sponsoring club.

**Enthusiastic Lion:** New members will look to you as an experience Lion. Share your knowledge of Lions with them, as well as your dedication and enthusiasm.

**Skilled Presenter:** If it has been a while since you last provided training, consider spending some time to refresh your presentation and training skills. There are many excellent reference materials to help you refine your presentation and group process skills, along with goal setting, action plan development and evaluation skills.

**Listener:** As Guiding Lion, sometimes it is good to simply listen and be a sounding board for the new club officers' thoughts and ideas and serve as an advisor or mentor.

**Computer Skills:** As a Guiding Lion you will be asked to submit and receive reports and emails and download publications. It will be vitally important that you have the ability to access and effectively utilize the LCI website.

***Most Important Skill of a Guiding Lion!...COMMITMENT!***

When asked, the number one attribute was the ability of the Guiding Lion to attend meetings and be valuable when needed. As Guiding Lion, expect to attend nearly all the club's meetings for the first six months and as frequently as possible over your two-year term.

**The Measure of Success.** The ultimate goal for the guiding Lion is to make the club independent and self-reliant. The Guiding Lion is only successful when they are no longer needed by the club.



## Section II: Get Off to a Good Start – Become an Information Expert!

Even seasoned and knowledgeable Lions find it challenging to stay current with the latest policies, support materials and initiatives. The guide below will help you prepare for training the club officers.

### Lions Learning Center (LLC)

The Lions Learning Center (LLC) offers club officers the opportunity to get in-depth, on-demand training for key aspects of their role and responsibilities to ensure the club leadership is prepared for continued success. Encourage club officers to become familiar with the Lions Learning Center (LLC) available on the Lions Clubs international Website by clicking on the Member Login link.

Begin your preparation by completing the following online modules:

**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.

**Club Secretary Responsibilities** – This module summarizes responsibilities, explains time lines and provides information and resources necessary to prepare for the club secretary position

**Club Treasurer Responsibilities** – This module provides basic information and resources necessary to prepare for the position of club treasurer position.

Be sure to check out these and other courses found in the Lions Learning Center (LLC) available on the Lions Clubs international Website by clicking on the Member Login.

## EXERCISE #2:

### Identify key concepts that should be shared as part of the club officer training

After reviewing the modules, determine at least three items or concepts that you believe would be the most valuable to the new club officers.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

What is the most important information to share with the club president?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

What is the most important information to share with the club secretary?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

What is the most important information to share with the club treasurer?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

In addition to the Club Officer Training, note other online courses that might be helpful.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

In addition to the online modules, contact your district governor, District Global Action Team – Global Leadership Team Coordinator (GLT), zone and region chairperson to gain an understanding of the training and support that is provided by district leaders.

**EXERCISE #3:**

**List the Training Resources Offered by the District and Multiple District**

**Club President**

District/Zone Training: \_\_\_\_\_

Multiple District Training: \_\_\_\_\_

**Club Secretary**

District/Zone Training: \_\_\_\_\_

Multiple District Training: \_\_\_\_\_

**Club Treasurer**

District/Zone Training: \_\_\_\_\_

Multiple District Training: \_\_\_\_\_

**Club Marketing Chairperson**

District/Zone Training: \_\_\_\_\_

Multiple District Training: \_\_\_\_\_

**Club Membership Chairperson**

District/Zone Training: \_\_\_\_\_

Multiple District Training: \_\_\_\_\_

**Club Service Chairperson**

District/Zone Training: \_\_\_\_\_

Multiple District Training: \_\_\_\_\_

**Club LCIF Coordinator**

District/Zone Training: \_\_\_\_\_

Multiple District Training: \_\_\_\_\_

**New Member Orientation**

District/Zone Training: \_\_\_\_\_

Multiple District Training: \_\_\_\_\_

## Resources for Effective Club Operation

Next, review the materials that are available on the LCI website entitled “Managing a Club”

This section includes the following:

[Managing a Club \(Club Officers Team\)](#) – This webpage provides quick access to helpful information to guide the officers in club operational resources.

[Standard Form Club Constitution and By-Laws](#) – This document outlines the structure and operation of a Lions club, including the roles and responsibilities of each officer. While the club may want to amend some practices and customize the document, new clubs automatically start with the standard constitution.

[Improving Club Quality Programs](#) – Review the materials offered that support club health. This would include the Club Quality Initiative, Plan for Your Club’s Success (Global Membership Approach) and Your Club, Your Way!. These tools help club members find service projects, customize their meeting and identify ways to improve club operations.

[Club Excellence Awards](#) – The Club Excellence Award provides a pathway to success by providing goals in the area of membership growth, humanitarian service, organizational excellence as well as communication. Encourage every club to strive for this prestigious award.

[Orientation Guide](#) – This guide will help provide an orientation for new members, so they understand the history and mission of our association and their role as a Lion. Meaningful inductions will help new members feel valued and engaged.

[Charter Night Planning Guide](#) – This guide will be very important to the sponsoring club but should also include the input from the new club. This guide provides a step-by-step plan for making the new clubs charter night memorable.

## **EXERCISE #4:**

### **Determine the value of the Managing a Club webpage**

What were the top three items that you feel are useful to promote excellence in club management?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Your Lion Account

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

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 LCI in the areas of Membership, Service Activity, Donations and Club strength. Also featured is District Goals Progress and Learn.

LEARN – Provides Lions a central location to complete Lions Learning Center (LLC) courses, search for LCI International institutes (ALLI, 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.

SHOP – The LCI Store is an easy way to order the most common club supplies and Lions Clubs International branded merchandise. If you have further questions regarding club supplies, please email [orderdetails@lionsclubs.org](mailto:orderdetails@lionsclubs.org).

## **EXERCISE #5:**

### **Get Familiar with MyLCI & MyLion**

Review MyLCI Frequently Asked Questions (FAQ) to learn the following.

1. [Registration](#)
2. [Managing your Club Officers](#)
3. [Managing your Club Roster](#)
4. [Managing your club’s Financial Statement](#)

Review the MyLion PowerPoints to familiarize yourself with the service system.

1. [Introducing MyLion](#)
2. [How to use MyLion to Support Your Service](#)



## Section III: Develop a Club Officer Mentor Team

Expand the support for the club by establishing a Club Officer Mentor Team to ensure the club has the support and guidance needed to be successful.

### Team members

**Two Certified Guiding Lions** – This will allow these two key leaders the ability to share the workload and expand the support. One Guiding Lion should try to attend each meeting and club event and be available for questions as needed.

**The District Governor Team** – While district projects may not support the club’s humanitarian mission...(remember, the club members joined with their own projects in mind) the new officers should be involved in the training and support provided by the district as soon as possible.

**The Zone Chairperson** – It is important that the club officers be included in the training and events hosted by the zone.

**Club Officer Mentor** – As a Guiding Lion, you may or may not be familiar with the administrative requirements of the club. Matching the officers with knowledgeable and experienced club officers from another club will provide very practical support. The mentor should be currently serving the position and aware of the latest tools and information.

**Club Officer Mentor Training Checklists** – Provide each Club Officer Mentor with a “Mentor Checklist” which is included for each officer position. You will find the checklists on pages 28 to 34.

**Today’s volunteer** is focused on the service that the club will provide and the personal satisfaction and enjoyment attained through the service experience. When working with club officers, help them to minimize time spent on administrative tasks. Always put the club’s goals first and then show the officers efficient ways to handle the required paperwork.

## EXERCISE #6: Develop your Club Officer Mentor Team

Identify the individuals who are qualified to serve in the following roles:

### District Support

District Governor

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

Main Responsibility: \_\_\_\_\_

District Global Leadership Coordinator

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

Main Responsibility: \_\_\_\_\_

District Global Membership Coordinator

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

Main Responsibility: \_\_\_\_\_

District Global Service Coordinator

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

Main Responsibility: \_\_\_\_\_

Zone Chairperson

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

Main Responsibility: \_\_\_\_\_

Others:

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**EXERCISE #6 (continued):  
Develop your Club Officer Mentor Team**

Identify the individuals who are qualified to serve in the following roles:

**Club Officer Mentors**

Club President Mentor

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

Main Responsibility: \_\_\_\_\_

Club First Vice President Mentor

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

Main Responsibility: \_\_\_\_\_

Club Secretary Mentor

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

Main Responsibility: \_\_\_\_\_

Club Treasurer Mentor

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

Main Responsibility: \_\_\_\_\_

Club Membership Chairperson Mentor

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

Main Responsibility: \_\_\_\_\_

Club Service Mentor

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

Main Responsibility: \_\_\_\_\_

Club Marketing Chairperson Mentor

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

Main Responsibility: \_\_\_\_\_

Club LCIF Coordinator Mentor

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

Main Responsibility: \_\_\_\_\_

## Section IV: Design Club Officer Training

The following is an outline to help organize and facilitate initial club officer training. Resources for each training session are also included. Draw from your experiences and adapt the materials to meet local needs and customs. Consider ways to make the training as meaningful and relevant as possible. The training may take place over a few sessions. Be prepared to help the new members find the information they will need. Allow time for questions and answers during each training session and include your Club Officer Mentor Team. Ideally, these sessions should take place weekly so the training can be completed within 30 days of appointment.

Note: There is a Club Officer Training Checklist on pages 26 and 27 to assist you with your sessions.

Note: The training needs might vary depending on the level of experience of the officers. Gauge the level of knowledge of your club officers. If the officers have served in leadership positions before, modify the training to meet their needs.

### **Training Session One: Getting Started!**

**Summary:** Introduction to Lions Clubs International, Lions Clubs International Foundation, Club Responsibilities and the Charter Night Ceremony. Initial meeting with Club Officer Mentor Team (this should take place within a week of club formation or assignment).

**References:** Club Officer Training located on the Lions Learning Center (LLC), Orientation Guide, Standard Form Club Constitution and By-Laws, Club President/Vice President e-Book, Club Secretary e-Book, Club Treasurer e-Book, Club Membership Chairperson e-Book, Club Service Chairperson e-Book, Club Marketing Chairperson Guide and the Charter Night Planning Guide. Be sure to include additional local resources.

**Goal:** At the end of this session, club officers will have a general understanding of club operation, club responsibilities, and charter night activities and have met their support team.

### **Sequence:**

#### **Introduction to Lions Clubs International Orientation Guide (12 minutes maximum)**

1. History of Lions Clubs International and a structure of the Club, Zone, Region, District, Multiple District and Constitutional Area: Begin with the club as the basic unit and be sure to explain that each level has different officers, stressing the support they provide. (3 minutes)
2. Zone Chairperson Support: The training and support offered at the zone level. (1 minute)
3. District Governor Team Support: Briefly review each position and the support they can offer the club officers. (2 minutes)
4. Support offered from LCI: Mention the training that is available, the [e-clubhouse](#) and other programs that might be helpful to the club officers. (3 minutes)
5. International Service Projects: Presented by the district governor, Global Service Team Coordinator and other knowledgeable Lions. (2 minutes)
6. Support offered by the zone, district and multiple district.
7. Reaffirm that each club is autonomous and that the club determines the programs and events that it will support. (1 minute)

## Introduction to Lions Clubs International Foundation (3 minutes maximum)

1. [Lions Clubs International Foundation'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.
2. As the only Lions foundation empowering Lions service worldwide, LCIF has awarded more than 18,000 grants, totaling more than US\$1.2 billion. Lions, clubs, districts, and multiple districts are encouraged to share stories of service made possible by these life changing grants at [LCIF: Stories of Pride](#).
3. The [Grants Toolkit](#) offers more information about the types of grants LCIF offers and resources to find out if there's a grant that's right for a club, district, or multiple district now, or in the future.
4. At the 104<sup>th</sup> Lions International Convention in Montreal, LCIF announced that it had exceeded its Campaign 100 goals, raising US\$325 million. Lions are encouraged to build on this momentum and continue [supporting the foundation](#), as the needs of the world continue to grow, and LCIF magnifies Lions ability to respond to those in needs.

## Understanding Club Responsibilities – Club Constitution and By-Laws (23 minutes)

1. [Standard Form Club Constitution and By-Laws](#): Contains the primary governing guidelines for the club. For each item, briefly review the important points covered in the constitution.
2. Mission Statement, Slogan, Motto, Purpose, Objectives and Ethics: These are the fundamental guiding ideals of the association, and it is important that all officers are familiar with them. (2 minutes)
3. [Type of Membership](#): Briefly review each type (3 minutes). Please check a current issue of the Standard Form Club Constitution and By-Laws for further information about these member types.
4. [Fees and Dues](#): Explain the dues structure and how the dues amount is established. (2 minutes)
5. Officer Responsibility: Briefly review each officer's roles and responsibilities and note that their officer mentor will provide personal and detailed information about the position. (5 minutes)
6. [Board of Directors](#): Explain the function, roles and responsibilities of a club's board of directors. (2 minutes)
7. Managing Funds: Explain the difference between "Administrative" and Public (activity)" funds. (2 minutes)
8. Elections: Indicate when and how elections should take place. (2 minutes)
9. Meetings: Explain the difference between general and board business meetings and customarily what is discussed, or not discussed, at each. (2 minutes)
10. Convention and Convention Delegates: Describe the events at the district convention and encourage all the club members to attend. Discuss how the club can get involved in convention activities. (3 minutes)

**Today's volunteer** is more interested in what an organization can accomplish and less concerned with titles and protocol. Titles are only important when it is noted how the leader can support the club.

**Charter Night – Charter Night Planning Guide (15 minutes)**

Briefly review the [Charter Night Planning Guide](#), paying particular attention to timelines and responsibilities. Keep in mind that this event may be a challenge for the new club. Offer assistance by encouraging the sponsoring club or district to host the Charter Night.

**Club Officer Mentor Team (10 minutes)**

Introduce the new club officers to the Club Officer Mentor Team. Provide the name and contact number along with each person’s expertise. Each club officer Mentor should schedule a personal meeting with their designated club officer. Give each position and their prospective mentor a checklist to cover for their position. Checklists can be found on pages 28 to 34.

**EXERCISE #7:  
Key Objectives of Training Session One**

Training Session One is an overview of LCI, why is that important? What do you consider the three most important objectives of the first training session?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## **Training Session Two: Club Operations:**

**Summary:** Review key [club leadership positions](#) and strategies to finding meaningful service projects. Stress the concepts of planning, teamwork and communication to the new officers.

**References:** Club President/First Vice President e-Book, Club Secretary e-Book, Club Treasurer e-Book, Club Membership Chairperson e-Book, Club Service Chairperson e-Book, Club Marketing Chairperson Guide, Best Practice for Financial Transparency and Making It Happen! And any local resources that would be helpful.

**Goal:** At the end of this session, club officers will understand their role, how to access information and tools that support their role, and how to initiate their first service project.

### **Sequence:**

#### **Club Officer Responsibilities – Club Officer e-Books (20 minutes)**

The Club Officer e-Books ([Club President/First Vice President e-Book](#), [Club Secretary e-Book](#), [Club Treasurer e-Book](#), [Club Membership Chairperson e-Book](#), [Club Service Chairperson e-Book](#), [Club Marketing Chairperson Guide](#)) succinctly highlight the important role of each club officer. Briefly review each e-Book, noting any local adaptations when appropriate. By this time the new club officers met with their mentor and gone over the checklist. Review the club officer checklist to monitor their level of understanding and ease any concerns. If concerns arise, ask the mentor to assist or, if needed, assign a new mentor.

#### **Best Practice for Financial Transparency**

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

#### **Planning Service Activities – Making It Happen! (30 minutes)**

Service is at the heart of every club. When clubs conduct service projects that are worthwhile and meaningful, the community will respond with its support and the members will value their involvement.

During this session, walk the club officers through the process of identifying potential new projects by using the [“Making It Happen! Guide to Club Project Development.”](#) This guide walks a club through the evaluation process-and includes helpful worksheets to bring a project from idea to reality. If this exercise has not already been completed, encourage the club officers to conduct the exercise at the next meeting. If the club already has a project, consider using the tool after their initial project is completed. This exercise should not be rushed and could take 20 to 30 minutes.

The steps for “*Making It Happen!*” are as follows: See *Making It Happen!* for more details

**Step One: Make a list of Possible Programs:**

Give club members the opportunity to voice what they like about their community and brainstorm ideas for addressing community needs. Stress the importance of member input for this step.

**Step Two: Appoint Task Forces:**

Encourage interested club members to form a team to actively pursue their ideas. Explain to club officers the importance of involving members in activities quickly to keep them motivated and engaged.

**Step Three: Conduct Research:**

During this important step, task force members research the feasibility of their ideas. Encourage club officers to urge task force members to keep an open mind and not become discouraged during their step. If an idea is not feasible, perhaps there is another opportunity yet to be discovered.

**Step Four: Write a Plan:**

At this point, the idea truly begins to take shape. Explain that details are important during this stage.

**Step Five: Implement the Plan:**

All the club members’ hard work becomes reality! Stress that enthusiasm and recognition of achievement are keys to keeping momentum and motivation high.

Always remember that club projects are a club decision. Avoid promoting local or district programs that might take time and resources away from something that is truly meaningful to the members for at least the first 12 months.

Include any local materials, sample agendas, minutes, announcements, and any other material that would help the club operate effectively.

**EXERCISE #8:**

**Key Objectives of Training Session Two**

Training Session Two is more focused on the roles and responsibilities of the club.

What do you consider the three most important objectives of the second session?

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_

What local resources should be shared with the club? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



### Training Session Three: Hosting Productive and Meaningful Club Events

**Summary:** This training focuses on hosting positive and productive meetings and events as well as techniques for boosting meeting attendance. This training should take place within 30 days of the date the charter was approved or the club as assigned to the Guiding Lion so the strategies mentioned can be applied as soon as possible.

**References:** Your Club, Your Way!, Meeting Management Course (online – Lions Learning Center)

**Goal:** To encourage positive and meaningful meetings that are well attended.

Meaningful and productive meetings are critical for new club success. This is the time for the members to gather and discuss project ideas as well as enjoy fellowship. But sometimes, for new clubs and new club officers, hosting an effective meeting is a challenge.

Meetings or club gatherings should begin to take place regularly after the application has been submitted. If meetings have taken place prior to this training session, discuss their success and perhaps areas of improvement. If meetings have not yet taken place, take this opportunity to help the officers plan a well-attended and meaningful meeting. In either case, always be positive and encouraging. If needed, review the following ideas that apply:

#### **How to increase attendance at meetings (10-15 minutes or more if attendance is lacking)**

To encourage attendance, be sure to check the following:

- The meeting date, time and location meets the needs of your members and potential members needs.
- Send invitations announcing activities that will be taking place to you members and potential members.
- Personal calls to invite current and potential members needing additional encouragement helps them know their support and involvement in the club and community is appreciated and needed.
- By inviting an interesting and relevant speaker to each general meeting gives members and potential members a reason to attend meetings.
- Make sure each member who attends the meeting is involved in a project that is meaningful to them.

### How to Improve Overall Meetings

See the following resources for more information concerning effective and positive meetings. These resources can be used to help the club build a strong foundation and continue to improve and attract members.

[Your Club, Your Way!](#) – This guide will help the club customize the meeting to suit the members needs and includes tips for program ideas, how to keep members interested and how to manage the meeting successfully. A sample questionnaire and meeting planning forms are included in the guide.

**Meeting Management** – This online course, located in the [Lions Learning Center \(LLC\)](#), provides information for facilitating effective meetings and good meeting management.

**Share local traditions!** – Be sure to explain activities and programs that are unique to your area.

### EXERCISE #9:

#### Productive and Meaningful Meetings

What elements are key to a positive and productive meeting?

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What can be done to increase attendance?

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Following the initial training, the club officers should be encouraged to attend region or zone meetings and other district events for continued training and should stay in contact with their Club Mentor for further guidance.

## Training Session Four: The Importance of Recruitment and Retention

**Summary:** This section underscores the importance of continued club growth and provides an opportunity to check the process made by the Club Officer Mentor Team.

**Reference:** Club Membership Chairperson e-Book, Just Ask! New Member Recruiting Guide, Club Membership Chairperson Guide, [Membership Satisfaction Guide](#).

**Goal:** To initiate an ongoing membership recruiting plan and confirm club officer development.

**Sequence:**

### The Importance of Recruitment and Retention – Club Membership Chairperson e-Book (45 minutes)

Review the [Club Membership Chairperson e-Book](#) and using the [Just Ask! New Member Recruiting Guide](#) as a resource and discuss the following topics:

1. **Recruiting New Members:** Discuss successful ideas for finding new members.
2. **Sponsor's Responsibilities:** Review the importance of a committed sponsor both in the recruiting of new members and in the engagement and satisfaction of each new member.
3. **Induction Ceremony:** Discuss the importance of properly inducting new members. Stress the importance of making the induction ceremony meaningful for the new member.
4. **New Member Orientation:** Explain how important a thorough orientation is to retaining members. Stress that the orientation should focus on the benefits and support that the club can provide them as they strive to successfully conduct humanitarian and/or community projects. Connect club activities to interests the new member expressed on their new member questionnaire (found in the Just Ask! Guide).
5. **Membership Awards:** Review current information regarding awards available from the club, district, multiple district, and Lions Clubs International. Information regarding Key Awards and Membership Satisfaction Award are available from Lions Clubs International.
6. **Involvement:** Stress the importance of getting members engaged immediately and keep them motivated. Discuss the strategies from the Membership Satisfaction Guide to identify and prevent common causes of member drops.
7. **Further Training:** Encourage the completion of relevant courses in the Lions Learning Center (Membership Satisfaction, Conflict Resolution, Invite for Impact, Global Membership Approach)

### Follow-up Development (15 minutes)

Take a moment to make sure that the officers know their responsibilities and that the club officer mentors are assisting the new club officers effectively. Leave time for any open issue or concern and to announce any news from the district that might be relevant to the officers.

## EXERCISE #10: Creating a Membership Plan:

Describe successful ideas for recruiting new members that could be shared with new club officers.

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### Training Session Five: Planning for the Future and Achieving Excellence

**Summary:** Review the need for ongoing planning and development. This should take place after the club has operated for a few months and before new club officers take office for the next fiscal year.

**Reference:** Club Quality Initiative (more thorough and advanced), Plan for Your Club's Success (Global Membership Approach) (a simple assessment) and the Club Excellence Award.

**Goal:** To encourage planning and continued club development.

#### **Sequence:**

Determine if the club should use the basic strategic planning strategy (The Plan for Your Club's Success - Global Membership Approach) or if the club is ready to go through a more thorough assessment which is outlined in the Club Quality Initiative.

Plan for Your Club's Success – Use this [planning guide](#) and [PowerPoint](#) 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, assess your club's needs and organize your plan for a successful implementation.

[Club Quality Initiative](#) – This process takes from four to six hours or can be conducted over a series of meetings. See the Club Quality Assessment Guide for additional information.

[Club Excellence Award](#) – Review the requirements needed to achieve the excellence award. The award can provide the club with ongoing direction and recognize the club president for their dedication.

**Local Membership Activities** – Include activities and ideas that local clubs use to increase members and strengthen member retention.

## Section V: Assessing Club Needs

The Certified Guiding Lion Program is designed to help new and existing clubs operate more effectively. To customize the support for an established club, see the Club Assessment on pages 35 to 39 to determine club needs and areas for development. This needs assessment may also be used as a checklist for new officers to confirm understanding and find areas that might need further support.

## Section VI: Guiding Lion Resources

### Club Health Assessment

As Guiding Lion you will receive a monthly club health assessment report electronically each month. This report will provide the membership growth or loss, reporting history, note if the club account payment is past due and report any donations made to LCIF. You must be registered as the Guiding Lion for the club and have a recorded email address to receive the report.

### Club Health Assessment Strategies

This [tip sheet](#) helps a district governor understand the key indicators of club health on the club health assessment report.

### Club Troubleshooting Guide

Helpful [guide](#) that identifies common club issues and provides resources with potential solutions.

### Quarterly Report

It is important that your district governor and LCI is informed of the progress of the club and any challenges you might face along the way. The Quarterly Report found on page 45 provides valuable information to ensure continued development. Regular reporting is a requirement for the Presidential Certified Guiding Lion Award.

### Guiding Lion Support

As Guiding Lion, you are also encouraged to contact Lions Clubs International for more information and support directly from the District and Club Administration Division. Guiding Lion support can be reached by telephone (630) 468-6810 or email [certifiedguidinglions@lionsclubs.org](mailto:certifiedguidinglions@lionsclubs.org)

## CLUB OFFICER TRAINING CHECKLIST

Use this checklist to assist you with your sessions.

### **Session One: Introduction to Lions Clubs International, Lions Clubs International Foundation, Club Responsibilities, Charter Night Ceremony and the Club Officer Mentor Team.**

#### Introduction to Lions Clubs International Orientation Guide

- History of Lions Clubs International and Lions Clubs International Foundation
- Structure of Clubs, Zones, Regions, Districts, Multiple Districts
- Zone level support
- District Team Support
- Support offered by LCI
- Club Officer Training online course (Lions Learning Center)
- International service projects
- Membership responsibilities

#### Club Responsibilities – Standard Form Constitution and By-Laws

- Mission Statement
- Types of Membership
- Fees and dues
- Club officer responsibility overview
- Club Board of Directors
- Managing Club Funds – Administrative Account and Activities Account
- Club Elections
- Club Meetings
- Convention and other events

#### Charter Night Planning Guide

- Charter Night
- Introduce Club Officer Mentor Team

## **Session Two: Club Officer Responsibility and Initiating Meaningful Projects**

- Roles and responsibilities of each officer
- Best Practices for Financial Transparency
- Check to make sure they are working with the Mentor
- Making It Happen! Guide to Club Project Development

## **Session Three: Hosting Productive and Meaningful Meetings**

- How to increase attendance at meetings
- How to improve overall meetings
  - Your Club, Your Way!
  - Meeting Management online course (Lions Learning Center)
  - Meeting Program Ideas

## **Session Four: Recruitment and Retention**

- Recruiting members
- Sponsor responsibilities
- Induction Ceremony
- New Member Orientation
- How are Your Ratings?
- Membership Awards
- The importance of involvement
- Check to make sure each officer is receiving guidance from their mentor

## **Session Five: Planning for the Future and Achieving Excellence**

- Club Quality Initiative
- Plan for Your Club's Success (Global Membership Approach)
- Club Excellence Award

## CLUB PRESIDENT MENTOR CHECKLIST

*The following training should be conducted by the Club Officer Mentor within 30 days*

Club Name: \_\_\_\_\_

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

Email Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

### **Roles and Responsibilities (for full description, please see the Standard Form Club Constitution and By-Laws):**

The club president is the chief executive officer of the club:

1. Presides at all meetings of the board of directors and the general membership meetings.
2. Implement action plans membership growth, service, community engagement and operational improvement.
3. Presides over the annual elections, ensure they are duly called, noticed and held.
4. Ensure the club is operating in accordance with local laws, club and international constitution and by-laws.
5. Be an active member of the district governor's advisory committee of the zone in which this club is located.

**Resources:** Introduce the new club president to the resources as noted below. (Material may be covered over multiple sessions):

- Review the club president webpage.
- Standard Form Club Constitution and By-Laws: Review the sections of the Constitution and By-Laws in detail, noting when the information might be applied.
- Lions Learning Center (LLC) available on the Lions Clubs International website by clicking on the Member Login link.
  - Club Officer Training – 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.
- Provide the club president with a link to the LLC and when possible, go through the presentation in person so they have a thorough understanding of the roles and responsibilities and sources of information that can be accessed if additional information is needed.
- Provide additional resources, sample agendas, and other materials that the club president may find helpful.
- Encourage the club president to visit your club to see how other clubs are managed.

Club President correspondence from LCI: Encourage the club president to have a unique email on file to ensure that they don't miss out on important, helpful communication.



## CLUB SECRETARY MENTOR CHECKLIST

*The following training should be conducted by the Club Officer Mentor within 30 days*

Club Name: \_\_\_\_\_

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

Email Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

### **Roles and Responsibilities (for full description, please see the Standard Form Club Constitution and By-Laws):**

The club secretary is under the supervision and direction of the president and the board of directors. The secretary is the liaison between the club and the district in which this club is located, and the association. The responsibilities include:

1. Submit regular monthly membership reports to LCI.
2. Keep and maintain general records of the club, including records of minutes of club and board meetings, attendance, committee appointments, elections and membership roster.
3. Submit reports to the district governor's cabinet as requested.
4. Be an active member of the district governor's advisory committee of the zone in which this club is located.
5. Give bond for the faithful discharge of his/her office in such sum and with such surety as determined by the board of directors.
6. Deliver, in a timely manner, at the conclusion of their term in office, the general records of the club to their successor in office.

**Resources:** Introduce the new club secretary to the resources as noted below. (Material may be covered over multiple sessions):

- Review the club secretary webpage.
- Standard Form Club Constitution and By-Laws: Review the sections of the Constitution and By-Laws in detail, noting when the information might be applied.
- Lions Learning Center (LLC) available on the Lions Clubs International website by clicking on the Member Login link.
  - Club Officer Training – 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.
- Provide the club secretary with a link to the LLC and when possible, go through the presentation in person so they have a thorough understanding of the roles and responsibilities and sources of information that can be accessed if additional information is needed.
- MyLCI: Review the task specific help screens for their role as club secretary.
- Provide additional resources, sample minutes, reports and other materials that might be helpful
- Encourage the club secretary to visit your club to see how other clubs are managed.

Club Secretary correspondence from LCI: Encourage the club secretary to have a unique email on file to ensure that they don't miss out on important, helpful communication.

## CLUB TREASURER MENTOR CHECKLIST

*The following training should be conducted by the Club Officer Mentor within 30 days*

Club Name: \_\_\_\_\_

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

Email Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

### **Roles and Responsibilities (for full description, please see the Standard Form Club Constitution and By-Laws):**

1. Receive all monies, from the secretary and otherwise, and deposit the same in a bank or banks recommended by the finance committee and approved by the board of directors.
2. Pay out monies in payment of club obligations only on authority given by the board of directors. All checks and vouchers shall be signed by the treasurer and countersigned by one other officer, determined by the board of directors.
3. Keep and maintain general records of club receipts and disbursements.
4. With club secretary issue statements to each member for dues and other financial obligations owed to this club.
5. Prepare and submit monthly and semi-annual financial reports to the board of directors of this club.
6. Give bond for the faithful discharge of his/her office in such sum and with such surety as determined by the board of directors.

**Resources:** Introduce the new club treasurer to the resources as noted below. (Material may be covered over multiple sessions):

- Review the club treasurer webpage.
- Standard Form Club Constitution and By-Laws: Review the sections of the Constitution and By-Laws in detail, noting when the information might be applied.
- Lions Learning Center (LLC) available on the Lions Clubs International website by clicking on the Member Login link.
  - Club Officer Training – 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.
- MyLCI: Review the task specific help screens for their role as club treasurer.
- Provide additional resources, sample budgets, reports, and other materials that the club treasurer might find helpful. If needed, acquaint the club treasurer with local laws and/or regulations and refer to him or her to the necessary resources or contacts for additional information.
- Encourage the club treasurer to visit your club to see how other clubs are managed.

Club Treasurer correspondence from LCI: Encourage the club treasurer to have a unique email on file to ensure that they don't miss out on important, helpful communication.

## CLUB MEMBERSHIP CHAIRPERSON MENTOR CHECKLIST

*The following training should be conducted by the Club Officer Mentor within 30 days*

Club Name: \_\_\_\_\_

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

Email Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

### **Roles and Responsibilities (for full description, please see the Standard Form Club Constitution and By-Laws):**

1. Encourage all members to participate in membership growth by inviting prospective members to the club. Follow up with prospective members promptly.
2. Engage new members in activities that are of interest to the member.
3. Understand the different membership types and programs and promote them to club members.
4. Develop and lead a membership committee to help implement action plans to achieve the club's membership goals and to positively increase the member experience.
5. Ensure that new members are provided with an effective orientation so new members understand how the club operates within its district, multiple district and Lions Clubs International, with the support of the Club First Vice President.
6. Attend the district governor's advisory committee meeting of the zone when appropriate.
7. Collaborate with the District Global Action Team on membership initiatives, and participate in relevant district, region and zone meetings and events.

**Resources:** Introduce the new club membership chairperson to the resources as noted below. (Material may be covered over multiple sessions):

- Review the club membership chairperson webpage.
- Familiarize yourself with these helpful courses on the Lions Learning Center:
  - Invite for Impact
  - Conflict Resolution
  - Membership Satisfaction
  - Global Membership Approach
- Standard Form Club Constitution and By-Laws: Review information relevant to membership types.
- Club Membership Chairperson e-Book: Provides a fast and logical link to the information they need.
- Club Membership Chairperson Guide: Will help you organize and plan a meaningful, impactful membership experience.
- Just Ask! Fostering a Culture of Recruitment Guide: This guide will help your club recruit new members and effectively manage club growth by creating a culture of recruitment in your club.
- New Member Orientation Guide: provides an outline of information that may be presented over a series of meetings. Includes a trainers guide and PowerPoint to help facilitate the orientation.
- Membership Applications: Available in print or online for potential members.
- Membership Satisfaction Guide: This guide steps you through a plan to increase member satisfaction as well as provides solutions to some of the more common reasons members leave clubs.
- Encourage the club membership chairperson to visit your club to see how other clubs are managed.

Membership Chairpersons correspondence from LCI: Encourage the membership chairperson to have a unique email on file to ensure that they don't miss out on important, helpful communication.

## CLUB SERVICE CHAIRPERSON MENTOR CHECKLIST

*The following training should be conducted by the Club Officer Mentor within 30 days*

Club Name: \_\_\_\_\_

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

Email Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

### **Roles and Responsibilities (for full description, please see the Standard Form Club Constitution and By-Laws):**

1. Lead the service committee to implement the club's service action plans in order to achieve the club's service goals.
2. Report service activities to LCI.
3. Serve as a club resource on current community needs. Develop community partnerships to expand service and utilize tools and resources offered by LCI and LCIF.
4. Encourage participation and engagement in service projects.
5. Attend the district governor's advisory committee meeting of the zone in which the club is located when appropriate.
6. Collaborate with the District Global Action Team on LCI Global Causes, and participate in relevant district, region and zone meetings and events.

**Resources:** Introduce the new club service chairperson to the resources as noted below. (Material may be covered over multiple sessions):

- Review the club service chairperson webpage.
- Service Toolkit: Resources designed to help you assess, position and activate your club for greater impact.
- Club Service Chairperson e-Book: The e-Book provides a fast and logical link to the information they need.
- Our Global Causes: Learn about Lions Clubs International global causes and how to best service your community.
- Service Project Planners: Downloadable tools for clubs ready to engage our global causes.
- Global Service Team Toolbox: A Variety of resources including webinars and presentations about the Service Journey and the Value of Service.
- Encourage the club service chairperson to visit your club to see how other clubs are managed.

Service Chairpersons correspondence from LCI: Encourage the service chairperson to have a unique email on file to ensure that they don't miss out on important, helpful communication.

## CLUB MARKETING CHAIRPERSON MENTOR CHECKLIST

*The following training should be conducted by the Club Officer Mentor within 30 days*

Club Name: \_\_\_\_\_

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

Email Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

### **Roles and Responsibilities (for full description, please see the Standard Form Club Constitution and By-Laws):**

1. Increases the club's visibility in the community.
2. Promotes club events, service activities and other newsworthy stories.
3. Provide communication tools to club members and encourage them to participate in promoting the club.
4. Establishes relationships with the local media and officials as well as community influencers
5. Increases the impact of the club's projects and membership initiatives.
6. Attend the district governor's advisory committee meeting of the zone in which the club is located when appropriate.

**Resources:** Introduce the new club marketing chairperson to the resources as noted below. (Material may be covered over multiple sessions):

- Review the club marketing chairperson webpage and discuss the following:
  - Getting ready for your role
  - Earning club recognition via the new Lions International Marketing Award
  - Engaging your community with Facebook and other social media
  - Leveraging the power of the Lions brand
  - Accessing logos, brand guidelines, videos, social media guides and more
- Marketing Chairperson Guide.
- Review LCI's branding guidelines.
- Provide suggestions, additional resources and other materials that they might find helpful.
- Encourage the club marketing chairperson to visit your club to see how other clubs are managed.

Club Marketing Chairperson correspondence from LCI: Encourage the club marketing chairperson to have a unique email on file to ensure that they don't miss out on important, helpful communication.

## CLUB LCIF COORDINATOR MENTOR CHECKLIST

*The following training should be conducted by the Club Officer Mentor within 30 days*

Club Name: \_\_\_\_\_

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

Email Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

### **Roles and Responsibilities (for full description, please see the Standard Form Club Constitution and By-Laws):**

1. Communicates the mission and success of LCIF and its importance to Lions Clubs International
2. Implements LCIF development strategies within the club
3. Collaborates with LCIF district coordinator to promote LCIF in the local area to ensure alignment with district goals.
4. Collaborates with the club service chairperson and the Global Action Team to support club initiatives.

**Resources:** Introduce the new LCIF club coordinator to the resources as noted below. (Material may be covered over multiple sessions):

- Provide a link to the LCIF Grants Toolkit. Explain that this page contains the resources necessary to become familiar with the grant programs LCIF offers. Encourage them to assess needs in the community and share information with others.
- Provide a link to the Ways to Give page on the LCI website to become familiar with the ways to donate to LCIF and share the information with others.
- Provide copy of the Club LCIF Coordinator Manual
- Provide a link to the LCIF: Stories of Pride page and explain how club members can share stories of how LCIF empowered their service.
- Provide additional resources, pledge forms, and other materials that the Club LCIF Coordinator might find helpful.

Club LCIF Coordinator correspondence from LCI: Encourage the club marketing communications chairperson to have a unique email on file to ensure that they don't miss out on important, helpful communication.

# CLUB ASSESSMENT

Club Name: \_\_\_\_\_

Date: \_\_\_\_\_

**For established clubs** – Complete the checklist before club officer training to identify areas that could use improvement and design the training and support accordingly.

**For new clubs** – Complete the checklist after the first 90 days to confirm understanding and identify areas that need additional guidance.

## **Understanding Club Responsibilities:**

Assess the knowledge of the leaders to determine they know the fundamental concepts of Lions and volunteering or if they are ready for more advanced development.

*Do the officers have a general understanding of Lions Clubs International structure, objectives and history?*     Yes    No

### **Resources:**

[New Member Orientation](#)

*Do the officers understand the general responsibilities of their club?*     Yes    No

### **Resources:**

[Standard Form Club Constitution and By-Laws](#)

## **Club Management:**

Make sure club officers are aware of their roles and responsibilities and the training available to support effective club management.

*Do the following officers understand their responsibilities to effectively fulfill their role?*

*Club President*     Yes    No

### **Resources:**

[Club President/Vice President Webpage](#)

[Club President Mentor Checklist](#)

*Club First Vice President*     Yes    No

### **Resources:**

[Club President/Vice President Webpage](#)

Refer to the [Club President Mentor Checklist](#) as you prepare for your term

*Club Secretary*     Yes    No

### **Resources:**

[Club Secretary Webpage](#)

[Club Secretary Mentor Checklist](#)

Club Treasurer  Yes  No

**Resources:**

[Club Treasurer Webpage](#)

[Club Treasurer Mentor Checklist](#)

Club Membership Chairperson  Yes  No

**Resources:**

[Club Membership Chairperson Webpage](#)

[Club Membership Chairperson Mentor Checklist](#)

Club Marketing Chairperson  Yes  No

**Resources:**

[Club Marketing Chairperson Webpage](#)

[Club Marketing Chairperson Mentor Checklist](#)

Club Service Chairperson  Yes  No

**Resources:**

[Club Service Chairperson Webpage](#)

[Club Service Chairperson Mentor Checklist](#)

Club LCIF Coordinator  Yes  No

**Resources:**

[Club LCIF Coordinator Webpage](#)

[Club LCIF Coordinator Mentor Checklist](#)

The monthly [Club Health Assessment Report](#) will indicate if reports were filed, accounts are past due and elections are timely. Refer to the report to answer the items below.

Are membership and activity reports submitted regularly?  Yes  No

**Resources:**

[MyLCI](#)

[MyLION](#)

[Club Health Assessment Strategies](#)

Are the club accounts current?  Yes  No

**Resources:**

[Finance Resource Webpage](#)

District Recap Report

Does the club have new leadership each year (officers do not repeat)?  Yes  No



### **Service Activities:**

*Has the club assigned a Lion to the Club Service Chairperson position?*  Yes  No

*Is the club involved in meaningful service activities?*  Yes  No

*Are these activities visible and relevant to the community?*  Yes  No

*Are there other projects the members would rather pursue?*  Yes  No

If service activities need to be strengthened or new projects need to be identified visit the [Club Service Chairperson Webpage](#). In addition, follow the [Club Service Journey](#), [Global Causes](#), [Project Planner](#), [GST Toolbox](#) and [Making It Happen!](#)

### **Marketing:**

An effective marketing plan recognizes the club's efforts and makes the community aware of the club's activities. Communication, both internal and external, needs to be positive and inviting to existing and potential members.

*Has the club assigned a Lion to the Club Marketing Chairperson Position?*  Yes  No

*Does the club effectively publicize the projects that are supported?*  Yes  No

*Are meetings, events, and projects effectively communicated to club members?*  Yes  No

*Does the club have a website?*  Yes  No

*Is the club actively using Social Media?*  Yes  No

Applicable resources include the Marketing Guide, [e-Clubhouse](#) and Club Secretary Training. Also consider the Public Relations Course offered in the [Lions Learning Center](#).

### **Lions Clubs International Foundation:**

*Has the club assigned a Lion to the LCIF Coordinator position?*  Yes  No

*Are club members aware of LCIF grants and programs and the importance of supporting our global foundation?*  Yes  No

*Is the club involved in fundraising activities for LCIF?*  Yes  No

*Are these activities visible and relevant to the community?*  Yes  No

*Are there LCIF grant project members would like to pursue?*  Yes  No

To learn more about LCIF grant opportunities and to find resources to see if an LCIF grant is right for your club, district or multiple district, visit the [LCIF Grants Toolkit](#). To learn more how your club can support LCIF, visit the [Ways to Give](#) page. To read and share stories of service made possible by LCIF grants, visit [LCIF: Stories of Pride](#).

**Meetings:**

Poor Meetings can ruin a club. It is important that the club provides a welcoming atmosphere before new members are recruited.

*Are meetings positive, meaningful and productive?*  Yes  No

*Are they held regularly?*  Yes  No

*Are they well attended?*  Yes  No

*Is meeting attendance encouraged?*  Yes  No

*Do the meetings involve all the members?*  Yes  No

*What improvements could be made?* \_\_\_\_\_  
\_\_\_\_\_

**Resources:**

[Your Club, Your Way!](#)

**Membership Growth:**

Membership growth is most likely the greatest challenge for a club and should only be initiated after the club is operating effectively or the new members will most likely leave. Make sure all other issues are resolved before launching a membership campaign.

*Is the club actively recruiting?*  Yes  No

*Are all members, including new and existing members, involved in projects that they find meaningful?*  Yes  No

*Does the club have a membership plan?*  Yes  No

*Why are members leaving the club and what adjustments need to be made to improve retention?*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Resources:**

[Club Membership Chairperson Webpage](#)

**District Support:**

The purpose of the district leadership is to support club health and development. However, care needs to be taken to ensure that the club is supporting the projects and events that are interest to the club’s members. Studies show that healthy clubs will support district projects that are important to the members, however, they may also take away energy that is needed to rebuild a weak club.

*Is the district leadership viewed as positive and helpful?*    Yes       No

*Does the district or multiple district offer training opportunities that would benefit club officers and members?*    Yes       No

*Do club officers attend zone meetings?*    Yes       No

*Are district functions and meetings communicated effectively to club officers?*    Yes       No

*Do district events/projects detract club members from supporting their own projects?*    Yes       No

*What support could the district provide?*

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**Further Leadership Development:**

There are times when a club is failing due to leadership issues which could range from disruptive members to lack of direction. Lions Clubs International has a vast resource of leadership development courses and programs offered to members to help the Lion leaders be successful. Your District Global Leadership Team (GLT) Coordinator can provide more information about the training opportunities available. *Be sure to let new and existing members know the tremendous opportunity they have for personal growth by participating in the training programs offered by Lions Clubs International.* Visit the [Lions Learning Center](#) for additional information.

# TRANSITION TO INDEPENDENCE

Over the new two years, you will help the club gain independence. Following is a timeline to set goals and track achievements.

## YEAR ONE:

### 1st Quarter:

#### 30 Days:

- Help club president conduct Making It Happen! exercise to facilitate project planning
- Provide officer training over a number of sessions
- Attend meetings and coach when needed – both general and board meetings during the next two years
- File the first membership report and activity report
- Club officers meet with the mentors

#### 60 Days:

- Take the first steps to conduct service projects
- Help club officers assign committees. Take special care to involve all members
- Continue to invite new members
- Help plan Charter Night

#### 90 Days:

- Continue to plan service projects
- Introduce Club Officer Mentor Team
- Officers attend zone meetings
- Host Charter Night
- Officer leadership training when needed

### 2nd – 3rd Quarters:

- Make sure Monthly Membership Reports and activity reports are sent on time and completed properly
- Check progress on service projects
- Encourage club officers to attend meetings run by quality clubs
- Institute a membership campaign
- Continue to meet with club officers during general and board meetings to discuss challenges and opportunities
- Make sure the officers are involved in officer training on the district or multiple district level. Encourage them to participate in the Club Quality Initiative
- Encourage visitation to other Lions Clubs

### 4th Quarter:

Conduct a Club Quality Initiative – Determine if the club is meeting the members' needs by conducting the Club Quality Initiative to research the needs of the members and ensure member needs are being met, meetings are being run properly and there is a continuous club improvement. Determine short-term goals (within the next few months) and long-term goals (ongoing over the next 3-5 years) for the following year.

## GUIDING LION YEAR TWO

### 1st Quarter:

The new officers should be properly installed and begin their year with the following plans outlined in detail:

**Service Project Plan** – Make a plan for service projects, include action steps, goals and objectives. This plan should include a timeline and resource allocation that includes both funding and manpower. The publication Making It Happen! is an excellent resource for developing this plan.

**Recruiting Plan** – Outline plans for recruiting new members and promoting the club. This plan should include the formation or continuation of a membership committee.

**Leadership Development Plan** – Create a plan that outlines the development and support of club officers and leaders. Officers and members may do a self-assessment to see if they have a particular goal, personal or professional, that they would like to attain. Consider focusing the plan on leadership skills.

- Continue inviting club officers (and incoming club officers) to meetings run by quality clubs
- Continue participation in district activities
- Revise and expand the annual plan

### 2nd, 3rd and 4th Quarters:

- Track ongoing goals
- Set new goals
- Conduct Club Quality Initiative
- Encourage club visitations

### Ideas to Increase Meeting Attendance

1. Make sure meeting dates, time and location are convenient to the members.
2. Make sure the meeting place is comfortable and meets the needs of your members.
3. Use multiple communication methods to encourage attendance (email, letters and phone calls). Communication should be upbeat and include a positive description of the meeting program and underscore the importance of their involvement in the club's activities.
4. Invite members and potential members and encourage them to bring friends. Keep them informed of the developments and the progress made on service projects.
5. Provide a detailed status report of each club project and encourage members to get involved.
6. Feature an interesting program or presentation at each meeting.

## TEST FOR CERTIFIED GUIDING LION

1. Can the Certified Guiding Lion choose the club he/she wants to guide, once they are certified?
  - No, the governor appoints the Certified Guiding Lion
  - Yes, the Guiding Lion may choose the club
  - Yes, if the club is in the Certified Guiding Lions' district
2. Does the Certified Guiding Lion need to attend all the meetings of the club?
  - Yes, majority of club's general and board meetings for two years
  - Yes, must attend meetings for the first six months
  - No, must attend the board meetings only
3. Should the officers of the club participate in zone and district leadership training?
  - Yes, it's highly recommended
  - No, the Certified Guiding Lion provides all leadership training
  - Yes, but only in the second year of the club
4. Who determines the projects the club supports?
  - The club members determine what they feel is important for their community
  - The Certified Guiding Lion MUST chose the appropriate project for the club
  - The club must support LCIF before anything else
5. Should the Certified Guiding Lion nominate mentors for the officers of the club?
  - Yes, so each officer is trained by an experienced officer with the most current information
  - No, all the training should be done by the Certified Guiding Lion
  - Only after one year and if the officers are not performing their jobs well
6. Should the Certified Guiding Lion discuss recruitment and retention during the training sessions?
  - No, it's not a problem for a new club
  - Only after a year and if a club is losing membership
  - Yes, it's important
7. Is it necessary to explain how to host productive and meaningful club meetings?
  - No, they are adults, they should know
  - Only if you see that the attendance is low
  - Yes, it is key to continued participation
8. How many club officer training sessions are recommended?
  - If they are good leaders, only one is needed
  - Five sessions
  - Six sessions, if a new club three before charter night and three after
9. Does the Certified Guiding Lion have to send in a report?
  - Yes, every three months
  - Yes, only at the end of the two-year term
  - Only if there are problems with the new club
10. Does the Certified Guiding Lion have to send in a final report?
  - Yes, this provides a final statement of the club's progress
  - Only if the club is not working
  - Only if they haven't sent any reports before

11. Should the Certified Guiding Lion encourage club members and officers to visit other well managed clubs?
  - No, it could confuse them and give them the wrong ideas
  - Only after two years of membership
  - Yes, it's a way of learning
  
12. When is it recommended to conduct the "Club Officer Training?"
  - Within the 30 days of the charter application approval or assignment to existing club
  - Two months after the charter night or assignment to existing club
  - Only if needed
  
13. Should the new clubs participate in district activities?
  - No, it should wait for at least two years
  - Only in cases of International disasters
  - Yes, as soon as possible
  
14. Should a new club have a net growth during its first two years?
  - No, the new members must first get to know each other before recruiting new members
  - Yes, it proves that the club is doing well
  - Only if they lose members
  
15. Should the Certified Guiding Lion determine where and when the new club holds its meetings?
  - Yes, of course the Certified Guiding Lion would make the best decision
  - No, it must be the decision of the new members
  - It must be held when it is convenient for the Certified Guiding Lion
  
16. Does the zone chairperson belong to the "Club Officers Mentor Team?"
  - Yes, he/she does
  - No, he/she is a different commitment
  - Only if the governor appoints him/her
  
17. How long should each session of the Club Officer Training" last?
  - All day
  - Minimum of three hours with a coffee break
  - Each session should last about an hour
  
18. Should the Certified Guiding Lion explain the fees and dues?
  - Only after the charter night
  - Not at the beginning, they may lose interest
  - Yes, it's an important issue
  
19. Should the Certified Guiding Lion encourage the club to create a "Membership Recruiting Plan?"
  - During the second year of the club
  - Yes, it's one of the club's main objective
  - Only if the new club is losing members
  
20. Is increasing meeting attendance an important issue for a new club?
  - Yes, it's important to keep members involved
  - In the beginning only the officers must attend
  - Only after the charter night

## Certified Guiding Lion COMPLETION VERIFICATION FORM

**Certified Process:**

To become certified, complete this form and the questions on page 42 and 43. Meet with your district governor, District GLT Coordinator or Multiple District GLT Coordinator to review your answers and discuss areas of further development.

**Certified Guiding Lion Information:**

Date: \_\_\_\_\_

District: \_\_\_\_\_

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

Member Number: \_\_\_\_\_

Club Name: \_\_\_\_\_

Club Number: \_\_\_\_\_

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

To be an effective Certified Guiding Lion, you must have the time and ability to attend the majority of the club's meetings, provide on-going officer training and guidance, be available to talk to the club officers when they need assistance, and help empower the club so that the club achieves its service and membership goals. If asked to serve a new club, would you be able to fulfill these responsibilities?

Yes  No

**District Governor, District or Multiple District GLT Coordinator Approval**

The Lion noted above has completed the Certified Guiding Lion Program (as well as knowledge of local resources and practices) and has the skills and knowledge to serve as a Certified Guiding Lion.

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Signature: District Governor, District or Multiple District GLT Coordinator

**Upon approval submit form to:**

Lions Clubs International

C/O District and Club Administration Division, English Language Department

300 W. 22<sup>nd</sup> Street

Oak Brook, IL 60523-8842, USA

Email: [certifiedguidinglions@lionsclubs.org](mailto:certifiedguidinglions@lionsclubs.org)



# Guiding Lion Quarterly Report

Submit report each quarter for two years to Lions Clubs International and your district governor.

Date: \_\_\_\_\_

District: \_\_\_\_\_

Club Name: \_\_\_\_\_

Club Number: \_\_\_\_\_

Guiding Lion Name: \_\_\_\_\_

Member Number: \_\_\_\_\_

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

Are you in regular contact with the club?  YES  NO

## **Club Meetings:**

The club has held general and board meetings?  YES  NO

Are these meetings well attended?  YES  NO

Were you able to attend?  YES  NO

## **Membership:**

Is the club actively recruiting members?  YES  NO

Is the club losing members?  YES  NO

## **Service Projects:**

Completed: \_\_\_\_\_

Planned for the future: \_\_\_\_\_

## **Fundraisers:**

Completed: \_\_\_\_\_

Planned for the future: \_\_\_\_\_

## **Training:**

Have club officers received training?  YES  NO

If yes, please describe: \_\_\_\_\_

## **Overall Development:**

Are you having any challenges with the club?  YES  NO

What are your next steps? \_\_\_\_\_

How can LCI assist? \_\_\_\_\_

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Mail to: Lions Clubs International  
District and Club Administration Division  
300 W. 22<sup>nd</sup> Street, Oak Brook, IL 60523-8842, USA  
Email: [certifiedguidinglions@lionsclubs.org](mailto:certifiedguidinglions@lionsclubs.org)

# Guiding Lion Final Report and Award Application

*Submit report on the club's two-year anniversary*

Date: \_\_\_\_\_

District: \_\_\_\_\_

Club Name: \_\_\_\_\_

Club Number: \_\_\_\_\_

Guiding Lion Name: \_\_\_\_\_

Member Number: \_\_\_\_\_

Upon the completion of the two-year term, Guiding Lions may qualify for the Guiding Lion Award. Requirements for the Guiding Lion to qualify for the award are listed below broken out by the club and the Guiding Lion:

### Club

- Is in good standing with Lions Clubs International.
- Had a net membership growth and a minimum of 20 members at the close of the Guiding Lion's two-year term.
- Reported new service and fundraising projects and was encouraged to donate to LCIF.
- Participated in district activities (including zone meetings).
- Club officers confirm the Guiding Lion supported the club's development (sign the final report form).

### Guiding Lion

- Submitted Quarterly Reports to Lions Clubs International and their district governor.
- Completed the Certified Guiding Lion course prior to the end of their two-year assignment.
- Attended a majority of the club's general and board meetings.
- Submitted their Final Report to Lions Clubs International and their district governor.

### Approvals

Club President: \_\_\_\_\_ Date: \_\_\_\_\_

District Governor: \_\_\_\_\_ Date: \_\_\_\_\_

Mail to: Lions Clubs International  
District and Club Administration Division  
300 W. 22<sup>nd</sup> Street, Oak Brook, IL 60523-8842, USA  
Email: [certifiedguidinglions@lionsclubs.org](mailto:certifiedguidinglions@lionsclubs.org)

**NOTES:**







## Lions Clubs International

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