

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



**THE CERTIFIED  
GUIDING LION PROGRAM**

*A Course for Success*

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This course also includes the Certified Guiding Lion Program Review. Use the Program Review to submit your answers to the exercise in this guide and apply for the status of Certified Guiding Lion.

*“Leadership  
is more than service, it  
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more productive.”*

**C**ongratulations on taking your first step to becoming a Certified Guiding Lion! This course is designed to prepare you to guide a new club through its first two years. After successfully completing this course, you will become a Certified Guiding Lion – new club officers will look to you for training and guidance to further build their clubs, and you will be a valuable resource for your district for years to come. As a Certified Guiding Lion, you should work closely and in cooperation with your District Governor, District Extension Chairman, District Orientation Team, the sponsoring club, and the new club.

The Certified Guiding Lion Program was developed to strengthen the support provided by the Guiding Lion to:

1. Improve retention of new club members
2. Improve orientation of new club officers and members
3. Improve the assimilation of the new club membership into the Lions structure
4. Improve the relationship between the sponsoring club and the new club
5. Improve the support system of advisors over a longer period of time
6. Improve the knowledge level of the Guiding Lion

### **How is a Certified Guiding Lion Different Than a Guiding Lion?**

As with the traditional Guiding Lion Program, “Certified” Guiding Lions are also appointed by the district governor, with the advice of the president of the sponsoring club and the district extension chairman. However, this valued leader has successfully completed this course giving him or her the training and skills critical to the development of a new club. Certified Guiding Lions will be asked to serve the new club for **TWO YEARS INSTEAD OF ONE**. It is recommended that each new Lions Club obtain the support of **TWO GUIDING LIONS** and that these Lions become “Certified” before they begin their term or within 90 days of the new club’s charter approval date.

While not a requirement, Guiding Lions are often members of the sponsoring club. It is recommended that two Lions serve as a Guiding Lion for only one club at a time. District governors and members of the new club cannot serve as Guiding Lions.

## Guiding Lion vs Certified Guiding Lion

### *Guiding Lion*

Experienced Lion  
Appointed by the District Governor  
Assists the new club for one year

### *Certified Guiding Lion*

Experienced Lion  
Appointed by the District Governor  
Proven Leadership Skills  
Committed to assisting the new club for two years  
Two Guiding Lions appointed for each new club  
Successfully completes this course giving the Lion the training and the knowledge critical to the development of the new club.

## Certified Guiding Lion Course Objectives

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

- Understand your role as a Guiding Lion
- Help you develop a plan to assist the club
- Provide tools to help the new officers manage their club
- Locate the resources available to you and the club

### *Consider a Guiding Lion Team*

*A team of **TWO CERTIFIED GUIDING LIONS SERVING FOR TWO YEARS** doubles a new club's chance for success. Statistics have shown that when a new club fails, it generally occurs in the first or second year. Having two Guiding Lions strengthens the support provided to the new club and provides better assurance that at least one will be in attendance at each of the new club's meetings for the first few years. When having Guiding Lions work as a team, cooperation between the two is essential.*

## Program Design

This course includes three sections:

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

This section focuses on the leadership skills needed to be an effective Guiding Lion and to help you identify areas that you can develop further to make you a more effective leader and help you prepare to train the new club officers.

### **Section II. Club Officer Training**

Use this section to walk the new club officers through training. The section includes a detailed session outline and skill-building exercises to help you guide your new club officers through the material and find practical applications that will help them effectively manage their club. The exercises, titled "Put Yourself in Their Place," are designed to put you in the role of a new club officer to help you understand their roles and responsibilities. Encourage your new club officers to also use these exercises to enhance their understanding of the material.

### **Section III. Transition to Independence**

This section has a series of easy to use forms and checklists to help the club set goals and track progress through the first few years.

**ATTACHED: Certified Guiding Lion Program Review**

When the course is finished, complete the Certified Guiding Lion Program Review that is included with this publication. Then meet with your district governor and/or your district or multiple extension chairman to review your responses. At that time they may meet with you to help you master areas that you might need to develop further. Once your district governor has reviewed the material and feels you have satisfactory knowledge of the material, he or she will forward your completed program review to Lions Clubs International, where your certification will be documented. A certificate will then be mailed to you to acknowledge your accomplishment.

**IMPORTANT: PLEASE COMPLETE THE PROGRAM REVIEW BEFORE YOU ARE ASSIGNED A NEW CLUB OR WITHIN 90 DAYS OF BEING APPOINTED A GUIDING LION.**



## Receiving the Presidential Certified Guiding Lion Award

Once certified, you will be ready to serve as Certified Guiding Lion. To receive the Presidential Certified Guiding Lion Award, you must meet the requirements listed below during your two-year term. *The term begins on the new club's charter approval date.*

1. Lions Club International has received Quarterly Reports from the Certified Guiding Lion, the new club and the sponsoring club. See Quarterly Report Form on page 17 of this guide.

2. The new club confirms that they have a sound working relationship with the Certified Guiding Lion.
3. The Certified Guiding Lion team has attended most of the new club's general and board meetings.
4. There has been no change in new club officers without an acceptable cause.
5. The club has reported a net membership growth to Lions Clubs International.
6. The new club has reported new service and fundraising projects.
7. The new club has participated in district activities (including district cabinet meetings).
8. The new club officers/members have visited other clubs.
9. The new club's account is current or less than 60 days past due, as reported by Lions Clubs International.
10. District officers -- including the district membership, retention, leadership and extension chairmen -- have been informed of the club's progress.

You will receive the Presidential Certified Guiding Lion Award upon completion of the above requirements. To acknowledge that the requirements have been achieved, complete the Guiding Lion Final Report on page 18 and submit the form to the New Clubs and Marketing Department at Lions Clubs International.

## Section I. Skills of a Successful Guiding Lion

Administrator. Motivator. Team Builder. Communicator. Listener. A successful Guiding Lion needs to be many things. 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.

**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. Instilling pride is a great way to keep members responsible and committed to their club.

**Trainer:** A big part of your job will be to show new Lion leaders how to effectively manage their club and to lead the club in a positive direction. Helping both club officers and charter members learn about Lionism is a very important responsibility. Take some time before beginning the training to reacquaint yourself with the fundamentals of the international association, your multiple district, district, and your local club so you can incorporate the information into your new 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, respect the fact that it is made up of individuals. Recognize that each will have different skills, abilities and experience. Use individual strengths to the club's advantage.

**Goal Setter:** Help the group work together to define and set measurable goals and action plans to reach the defined goals.

**Team Builder:** Help the new club 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 new 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 new club leaders, while still allowing them to make decisions on their own.

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

**Enthusiastic Lion:** New members will look to you as an experienced 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 officer's thoughts and ideas and serve as an advisor or mentor.

### *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 he or she is no longer needed by the new club.*



## EXERCISE #1 – Assessment of Guiding Lion Skills

On page 2 of the Certified Guiding Lion Program Review, summarize the skills that you believe are important to the success of a Guiding Lion. Which characteristics do you feel you already possess and which ones do you feel you would like to develop further? How can you improve these skills?

### *Six Elements of a Successful Club*

1. A major service activity that the community and the members want
2. A major fundraising project in which the community will participate and contribute
3. Good public relations both inside and outside the club
4. Informative and inspirational meetings
5. Team spirit
6. Membership growth plan that includes meaningful induction ceremony and immediate orientation and involvement of a new member.

## Getting Off to a Good Start -- Preparation

### Important Resource Materials

#### *Publications*

A New Club Supply Kit is mailed to the primary Guiding Lion after the club's charter is approved. The materials are self-explanatory. When the kit is received, take a moment to review and familiarize yourself with its contents. *The materials that are included in this training course include:*

- Standard Form Lions Clubs Constitution and Bylaws (LA-2)
- Club Officer's Manual (LA-15)
- Orientation Guide (ME-13)
- Charter Night Planning Guide (TK-26)
- Club Membership Chairman's Manual (ME-12)
- Making It Happen, Guide to Club Project Development (TK-10)
- Community Needs Assessment (MK-9)

### *New Club Supply Kit Contents*

Only a few of the following materials are included in this training program but they are included in the new club's supply kit that is mailed to the Guiding Lion after the charter is approved.

#### President's Materials:

- International Constitution (LA-1)
- Standard Form Lions Clubs Constitution and Bylaws (LA-2)
- Club Officer's Manual (LA-15)
- President's Record Book
- Community Needs Assessment (MK-9)

#### Secretary's Materials

- Secretary Record Book
- Forms for Member Records
- Monthly Membership Report (MMR)
- Transfer Member Form (ME-20)
- Membership Cards
- Annual Activities Form (A1)
- Club Supply Catalog

#### Treasurer's Materials

- Treasurer Record Book
- Treasurer Forms

#### Membership Chairman Materials

- Orientation Guide (ME-13)
- Invitation and Proposal for Membership (ME-6)
- Member Nomination Form (EX-513)
- Charter Night Planning Guide (TK-26)
- Club Membership Chairman's Manual (ME-12)

If you have questions regarding the materials, contact the New Clubs and Marketing Department at Lions Clubs International Headquarters.

Telephone: 630-571-5466 ext. 305

Fax: 630-571-1691

E-mail [newclubs@lionsclubs.org](mailto:newclubs@lionsclubs.org)

### **Web Site**

Another excellent resource for preparation as a Guiding Lion is the Lions Clubs International Web site at [www.lionsclubs.org](http://www.lionsclubs.org). The Web site is brimming with valuable information about all aspects of the association. Some especially helpful sections include the Lions Learning Center, Activities & Programs, and Membership.

It is a good idea to familiarize yourself with the interactive sections of the Web site, where members can file reports, download materials, read monthly newsletters and purchase club supplies.

### **Support for the New Club**

The new club has an abundance of support at every level. Throughout training, stress the availability of this support and assistance. Gather contact information and material relating to the following:

- **Sponsoring Club:** The sponsoring club's support for the new club is critical to making the new club feel welcomed. The members and officers can provide the new club with valuable insights into local customs and traditions as well as administrative requirements. The sponsoring club should coordinate with the Guiding Lion and the new club officers when planning the details of the Charter Night celebration, which is further explained on page 9.

- **Zone:** The zone often hosts valuable training programs that may assist the new club officers and provide a forum to exchange ideas.
- **District:** The district may offer assistance through a network of district chairmen with special training in extension, membership, leadership development, club programs, and many other valuable skills. The new club will benefit from participating in a district event.
- **Multiple District:** The multiple district has a network of Lion leaders and events that the club will find informative and beneficial.
- **Lions Clubs International:** The International Headquarters and regional offices offer club recruiting materials, videos and other assistance to help increase membership and build a strong club. Most of these materials are explained on the Web site.
- **Be sure to notify your Multiple District regarding the formation of your new club.** Don't forget to send your District Governor copies of membership reports so that the new club members can be included on the District and Multiple District membership list.

# *Pull-out Section*

## **Section II: Club Officer Training**

The following is an overview of the materials that should be covered during 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 orientation as helpful and relevant to the new officers as possible. The training may take place over a few sessions. Keep the information manageable – present too much at one time and much of it will be forgotten. One helpful approach is to have written support materials available and only cover verbally those important items you want to highlight. Be prepared to help the new members find the information they will need. Be sure to allow time for questions and answers during all training sessions, and encourage discussion. A team, which includes the Guiding Lions and other district leaders, should present the training material.

Note: There is a Club Officer Training Checklist on page 14 to assist you with your sessions.

### ***Training Session One: Introduction to Lions Clubs International, Club Responsibilities and the Charter Night Ceremony***

During this training session, club officers will learn the basics about the International Association, as well as the structure of the club, district and multiple district. You will also review administrative details and responsibilities of the club. This section includes a great deal of important information that the officers will need to access on a regular basis. Make sure that they know where to find the information in printed resource materials when they need it.

During this session you should also highlight the importance of a proper Charter Night to build enthusiasm for the new club. Stress the value of the support provided by the sponsoring club and others who might help plan the celebration activities.

**References:** Orientation Guide (ME-13), Standard Form Lions Club Constitution and Bylaws (LA-2), Club Officer Manual (LA-15), and the Charter Night Planning Guide.

**Goal:** At the end of this session, club officers will have an overview of club operation, officer responsibilities, and Charter Night planning.

#### ***Introduction to Lions Clubs International – Orientation Guide***

1. History of Lions Clubs International: Touch on the proud traditions and scope of the association.
2. 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.
3. Officers and other Leadership Positions within the Club: Keep very brief – these will be discussed more fully in Session Two.
4. District Level Leadership Positions: Briefly review each position.
5. Overall Structure of Lions Clubs International: Presented by the current or past district governor or highly trained zone, region or leadership chairman.
6. International Service Projects: Presented by the district governor or another knowledgeable Lion.
7. Member Responsibilities: Focus on responsibility of membership in club and Lion Clubs International.

### **PUT YOURSELF IN THEIR PLACE!**



#### **EXERCISE #2 – Learning About Lions Clubs International**

On page 3 of the Certified Guiding Lion Program Review, list the top three points within the Orientation Guide that you feel are most important to each new club officer.

**Club Responsibilities – Standard Form Lions Clubs Constitution and Bylaws and Club Officer Manual (Section I)**

Explain that the Standard Form Lions Clubs Constitution and Bylaws contains the primary governing guidelines for the club. For each item, briefly review the important points covered in the constitution.

1. **Mission Statement, Slogan, Motto, Purpose, Objects and Ethics:** These are the fundamental guiding ideals of the association, and it is important that all officers are familiar with them.
2. **Type of Memberships:** Briefly review each type.
  - Active – a member entitled to all the rights and privileges of membership.
  - Associate – A member who holds his or her primary membership in another club.
  - Affiliate – A member who is not able to fully participate as an active member, but desires to support the club and the community services that it provides.
  - Members-At-Large – A member who has moved from the community or because of health or other reasons is unable to attend regular meetings but desires to maintain membership in the club.
  - Honorary – An individual, not a member of the club, who has performed outstanding service in the community and whom the club would like to confer this special distinction.
  - Privileged – A Lion who has been a member for 15 or more years, who, because of illness or another reason, must relinquish his or her active status.
  - Life – A member, who has maintained active membership for 20 years (and in some cases less), has rendered outstanding service to the community and has applied for Life Member Status.

Please check a current issue of the Standard Form Club Constitution and By-laws for further information about these member types.

3. **Fees and Dues:** Explain dues structure and how the dues amount is established.
4. **Officers:** Review each officer’s duties and responsibilities.

5. **Board of Directors:** Explain the function, duties and responsibilities of a club’s board of directors.
6. **Managing Funds:** Be sure to discuss the difference between “administrative” and “activities” funds.
7. **Elections:** Indicate when and how elections should take place.
8. **Meetings:** Explain the difference between general and board meetings and customarily what is discussed, or not discussed, at each.
9. **Convention Delegates:** Review the process for determining how many delegates a club is entitled to send to a district, multiple district and international convention.

**PUT YOURSELF IN THEIR PLACE!**



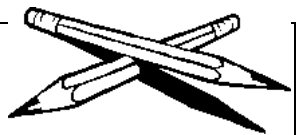
**EXERCISE #3 – Constitution Review**

On page 4 of the Certified Guiding Lion Program Review, list the top three points within the Standard Form Lions Club Constitution and Bylaws that you feel are most important to each new club officer.

**Charter Night – Charter Night Planning Guide**

Briefly review the Charter Night Planning Guide, paying particular attention to timelines and responsibilities. Offer assistance by encouraging the sponsoring club to become involved in the Charter Night planning.

**PUT YOURSELF IN THEIR PLACE!**



**EXERCISE #4 – Planning Charter Night**

On page 5 of the Certified Guiding Lion Program Review, list five ways that the sponsoring club can help the new club organize its Charter Night.

## ***Training Session Two: Club Officer Responsibilities and The Importance of Recruitment and Retention***

This session covers ways in which the new club can be managed efficiently and effectively. Stress the concepts of teamwork and communication to the new officers.

**References:** Club Officer Manual (LA-15) and Club Membership Chairman's Manual (ME-12)

**Goal:** At the end of this session, club officers will be asked to identify what they feel to be their most important role and challenge.

### ***Club Officer Responsibilities – Club Officer Manual, Section II***

The Club Officer Manual succinctly highlights the important items that the club officers should be familiar with. Briefly review each section, noting any local adaptations when appropriate.

1. Beginning the Year
  - Preparation
  - Setting Goals
  - Making Committee Assignments
  - Selecting Service Activities
  - Determine Record Keeping Methods
  - Know Your Forms
  - Fiscal Responsibilities
2. Throughout the Year
  - Running Meetings
  - Communicating Effectively
  - Handling Correspondence
  - Understanding Membership Issues
  - Financial Responsibilities
  - Promoting Your Club
  - Attending Zone Meetings
  - District Governor Visits
  - Attending Conventions
  - Conduct a Club Retreat
3. Finishing the Year
  - Recognizing Members
  - Appreciation Dinners
  - Club President's Excellence Award
  - Transitioning to the Next Leadership Team
  - Ordering Club Supplies



## **PUT YOURSELF IN THEIR PLACE!**

### **EXERCISE #5 – Club Officer Roles and Responsibilities**

On page 6 of the Certified Guiding Lion Program Review, please answer the following questions for each officer: president, secretary, treasurer and membership chairman.\*

1. What do you consider each officer's most important role?
2. What challenges will each officer need to overcome?

\* When conducting the club officer training session, ask each officer the above questions to help him or her assess their skills and to target areas of improvement.

### ***The Importance of Recruitment and Retention – Club Membership Chairman's Manual***

One of the most valuable lessons to teach the new club immediately is the importance of membership recruitment and retention efforts. What a club does in these areas will determine whether it will grow and strengthen or wither and die. Effective recruitment and retention efforts need to begin immediately. Lay a good foundation by setting a positive tone during the organizational meeting. Continue by setting proper expectations of club membership through a thorough orientation. Reinforce each member's value, and strengthen club retention, by involving the member in an activity that is meaningful to him or her. Advise the club that the best way to combat membership drops is to run an efficient, productive club, and to involve and to respect each member.

For more information on retention, visit the Club President Connection on the Lions Clubs International Web Site at [www.lionsclubs.org](http://www.lionsclubs.org). A copy of the President's Retention Campaign Kit is available upon request from the Membership Operations Department at Lions Clubs International.

Recruiting new members is a vital function for every club. Without members; Lions clubs would cease to exist. There are never too many hands to help meet a club's goals. Begin by recruiting a strong group to become charter members. Use the excitement of forming a new club to propel those attending the organizational meeting to invite their friends to join. Make sure club members understand the **importance of continual recruitment efforts**. Remember, for both recruitment and retention efforts, the time to act is before there is a problem.

Review the Club Membership Chairman's Manual and discuss the following topics:

1. **Obtaining New Members:** Discuss successful ideas for finding new members. Review the "Recruiting Wheel" concept with the club. See page 19 for a copy of the recruiting wheel.
2. **Sponsor's Responsibilities:** Review the importance of a committed sponsor both in the recruiting of new members and in retaining each new member.
3. **Induction Ceremony:** Discuss the importance of properly inducting new members.
4. **New Member Orientation:** Explain how important a thorough orientation is to retaining members.
5. **Membership Retention:** Review the three major threats to retention – boring club meetings, cliques/politics, and a lack of meaningful personal involvement – and briefly discuss ideas for combating these threats. Consult the President's Retention Campaign kit for more information.
6. **How Are Your Ratings?** Discuss the value in asking your members' opinions regarding your club.
7. **Membership Awards:** Review current information regarding awards available from the club, district, multiple district, and Lions Clubs International. Information regarding Key Awards and the Year Round Growth is available from Lions Clubs International.
8. Getting members involved immediately and keeping them motivated.



## PUT YOURSELF IN THEIR PLACE!

EXERCISE #6 – Creating a Membership Recruiting Plan

On page 7 of the Certified Guiding Lion Program Review, describe successful ways for recruiting new members.

\* When conducting club officer training, ask the officers to develop a plan with the help of their club membership chairman.

*Additional information about membership recruitment and retention is available in the Membership section of the Lions Clubs International Web site at [www.lionsclubs.org](http://www.lionsclubs.org) or by contacting the New Clubs and Marketing Department or the Membership Operations Department at Lions Clubs International Headquarters.*

**Training Session Three:  
Planning for the Future**

During this final session, you will help the officers shape the future of their club. Help the club start thinking about its responsibility to the community by discussing strategies for planning and implementing service activities. This is a great opportunity to build enthusiasm and motivate club officers for their upcoming roles.

**References:** Making it Happen (TK-10)


**Goal:** Create an action plan for the new club.

**Planning Service Activities – Making It Happen**

The primary mission of any Lions club is to serve those in need. Determining how best to allocate a club’s volunteer and financial resources is a very important step for any new club. When clubs conduct service projects that are worthwhile and meaningful, the community will respond with its support, and the members will respond by continuing their dedication to the club. For new clubs, gather potential project information by asking the members to brainstorm ways to meet community needs using the “Making it Happen, Guide to Club Project Development” (TK-10) and the “Community Needs Assessment” (MK-9). The Guide to Club Project Development walks a club through the evaluation process, and includes helpful worksheets to bring a project from idea to reality. Suggest conducting a “Club Retreat” to accomplish the following:

1. **Step One: Make a List of Possible Programs:** This step gives 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.
2. **Step Two: Appoint Task Forces:** Interested club members have the opportunity to form a team to actively pursue their ideas. Explain to club officers the importance of involving interested and motivated members in order to keep their enthusiasm high.

3. **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 this step. If an idea is not feasible, perhaps there is another opportunity yet to be discovered.
4. **Step Four: Write a Plan:** At this point, the idea truly begins to take shape. Explain that details are important during this stage.
5. **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.



**PUT YOURSELF  
IN THEIR PLACE!**

**EXERCISE #7 – Making it Happen!**

On page 8 of the Certified Guiding Lion Program Review, list the five steps for project development mentioned in “Making it Happen!”

**District Responsibilities**

When conducting officer training, this section should be presented by the district governor, past district governor, zone chairman or region chairman. It is an ideal opportunity to discuss local leadership, customs, programs, and available support.

The Lion leader should review:

1. **Role of the District:** The relationship between the club and district.
2. **Titles and Acronyms:** Explain the meaning of local titles and acronyms.
3. **Support:** The type of support that the district provides. Include training that is provided by district chairmen and others.

4. Events and Programs: Provide dates and contact information for district events and programs.
5. Contact Information: Provide contact information for the district governor, sponsoring club, zone chairmen, International Area Representative, and Lions Clubs International.

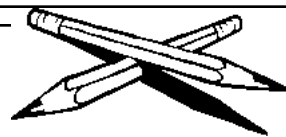
**PUT YOURSELF  
IN THEIR PLACE!**



**EXERCISE #8 – Your District in Depth**

On page 8 of the Certified Guiding Lion Program Review, note the assistance your district can provide to the new club.

**PUT YOURSELF  
IN THEIR PLACE!**



**EXERCISE #9 – Club Priorities and Action Plan**

On page 9 of the Certified Guiding Lion Program Review, answer the following questions as if you were the president of a new club.\*

1. What are the club’s top priorities? – Outline club priorities and goals. Priorities should include planning a service project, launching a membership campaign and club officers and chairpersons fulfilling their responsibilities. They are free to add other priorities.
2. List the tasks needed to accomplish the priorities and assign responsibility for each task. Include a timeframe for each task.
3. How can the group get others involved to accomplish each task or goal?
4. What obstacles or challenges will they face accomplishing each task or goal?
3. How can they overcome these challenges?

\* When conducting club officer training, ask the officers to complete these questions as a group.

***Persistence is a Key to Success***

*Serving as a Guiding Lion is not always an easy task. You may be giving several hours a week during your tenure, and you may encounter resistance and frustration. However, you will find that your duties as a Guiding Lion will give you an immense feeling of personal satisfaction that should help motivate you to continue through any challenges.*



**EXERCISE #10 – Planning Your Term**

On page 10 of the Certified Guiding Lion Program Review, write down your plan for being a Certified Guiding Lion, which should include:

1. A training schedule
2. A communication plan with the new club and the district officers, including the district membership, retention, leadership and extension chairman
3. A reporting schedule
4. Recognizing the achievements of officers and new club members
5. Determining short-term goals with action plans and timetables
6. Setting long-term goals with action plans and timetables

## Club Officer Training Checklist

Use this Club Officer Training Checklist to assist you with your sessions.

### Orientation Guide

- History of Lions Clubs International
- Officer and other Leadership positions within the New Club
- District Level Leadership Positions
- Structure of Clubs, Zones, Regions, Districts, Multiple Districts and Constitutional Areas
- Overall Structure of Lions Clubs International

### Standard Form Constitution and By-laws and Charter Night Ceremony

- Purpose and Objects
- Types of Memberships
- Fees and Dues
- Officers and Board of Directors
- Managing Funds
- Elections
- Meetings
- Convention Delegates

### Plan a Charter Night Celebration

- Planning the event
- Charter Night Checklist
- Sponsoring Club support

## Club Officer Manual

### Beginning the Year

- Setting Goals
- Making Committee Assignments
- Selecting Service Activities
- Record Keeping

### Throughout the Year

- Running Meetings
- Communicating Effectively
- Financial Responsibilities
- Attending Zone Meetings
- Attending Conventions
- Planning and hosting an annual Club Retreat

### Finishing the Year

- Recognizing members
- Club President's Excellence Award
- Ordering Club Supplies

## Club Membership Chairman's Manual

- Obtaining New Members
- Sponsor's Responsibilities
- Induction Ceremony
- New Member Orientation
- Membership Retention
- Creating a Membership Recruiting Plan

## Planning

- Plan Projects Using "Making it Happen"
- Develop Long-Term and Short-Term Plans

## Section III. Transition to Independence

Over the next two years, you will help the club to function efficiently on its own. Following is a quarter-by-quarter guide to assist you, along with a training checklist, coaching forms and reports. Use these forms to set goals and track achievements.

### Guiding Lion Checklist

As the Guiding Lion, use this checklist to track the progress of your new club.

#### GUIDING LION YEAR ONE:

##### 1st Quarter:

- Help organize new club
- Help plan Charter Night
- Help club president conduct “Making it Happen” (TK-10) exercise to facilitate project planning
- Provide officer training over a number of sessions
- Plan a membership campaign
- Attend meetings and coach when needed -- both general and board meetings during the next two years

##### 2nd – 3rd Quarters:

- Make sure Monthly Membership Reports are sent on time and completed properly
- Check progress and project plan
- 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
- Encourage the new club to conduct a club retreat
- Make sure the officers are involved in officer training on the district or multiple district level
- Encourage visitations to other Lions clubs

##### 4th Quarter:

- Conduct a year-end review (perhaps during a Club Retreat) and help the club officers develop an annual plan, which should include:
  - ✓ Analyzing progress toward goals and looking for ways to improve
  - ✓ Researching retention challenges – institute a system to research the needs of the members to ensure their needs are being met, meetings are being run properly, and there is continuous improvement of the membership experience
  - ✓ Determining other short-term goals (within the next few months)
  - ✓ Setting long-term goals (ongoing over the next 3-5 years)

## GUIDING LION YEAR TWO

### 1st Quarter:

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

**Project Plan** – Make a three-year 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” (TK-10) 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 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 focussing the plan on leadership skills.

**Retention Plan** – Develop a plan that includes a system to research the needs of the members to ensure member needs are being met, meetings are being run properly and there is a continuous improvement of the membership experience.

- Provide ongoing club support and coaching when needed
- 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 & 4th Quarters:

- Track ongoing goals
- Set new goals
- Conduct Club Retreat
- Encourage club visitations

# Certified Guiding Lion Report Form

## QUARTERLY REPORT

Date of Report: \_\_\_\_\_

New Club Name: \_\_\_\_\_ Club Number: \_\_\_\_\_

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

Name of Reporting Person: \_\_\_\_\_

Title:  Guiding Lion  Charter Club President  Sponsoring Club President

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_

Zip/Postal Code: \_\_\_\_\_ Country: \_\_\_\_\_

Telephone Residential: \_\_\_\_\_ Business: \_\_\_\_\_

Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

The club has held general and board meetings in accordance with the Club Constitution and Bylaws:

YES  NO

Number of meetings attended by a Guiding Lion: \_\_\_\_\_

### Service Projects:

Preformed: \_\_\_\_\_

Planned: \_\_\_\_\_

### Fundraisers:

Preformed: \_\_\_\_\_

Planned: \_\_\_\_\_

Have new club officers visited other well-managed clubs?  YES  NO

Are the district officers, including the district membership, retention, leadership and extension chairmen informed of the new club's progress and needs?  YES  NO

Goals Achieved: \_\_\_\_\_

Goals for the Next Quarter: \_\_\_\_\_

# Certified Guiding Lion Report Form

## FINAL REPORT

I submit the final report for the \_\_\_\_\_ Lions Club (club number: \_\_\_\_\_) and have fulfilled requirements for the Presidential Certified Guiding Lion Award as stated below:

- Quarterly reports submitted to Lions Clubs International Headquarters for two years by the Certified Guiding Lion, new club and sponsoring club
- Completion of the Certified Guiding Lion course
- Working relationship with the new club
- Attendance at the new club meetings, both general and board meetings
- Stability of club leadership (no change in officers without acceptable cause)
- Membership growth (as reported by Lions Clubs International Headquarters)
- The club has new service and fundraising projects
- The club has been involved in district activities
- The club officers/members have visited other clubs
- The club has conducted an Annual Club Retreat
- Dues/club account is current or less than 60 days past due, as reported by Lions Clubs International Headquarters
- District officers, including the district membership, retention, leadership and extension chairmen, have been informed of the club's progress

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

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_

Zip/Postal Code: \_\_\_\_\_ Country: \_\_\_\_\_

Telephone Residential: \_\_\_\_\_ Business: \_\_\_\_\_

Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

# Recruiting Wheel

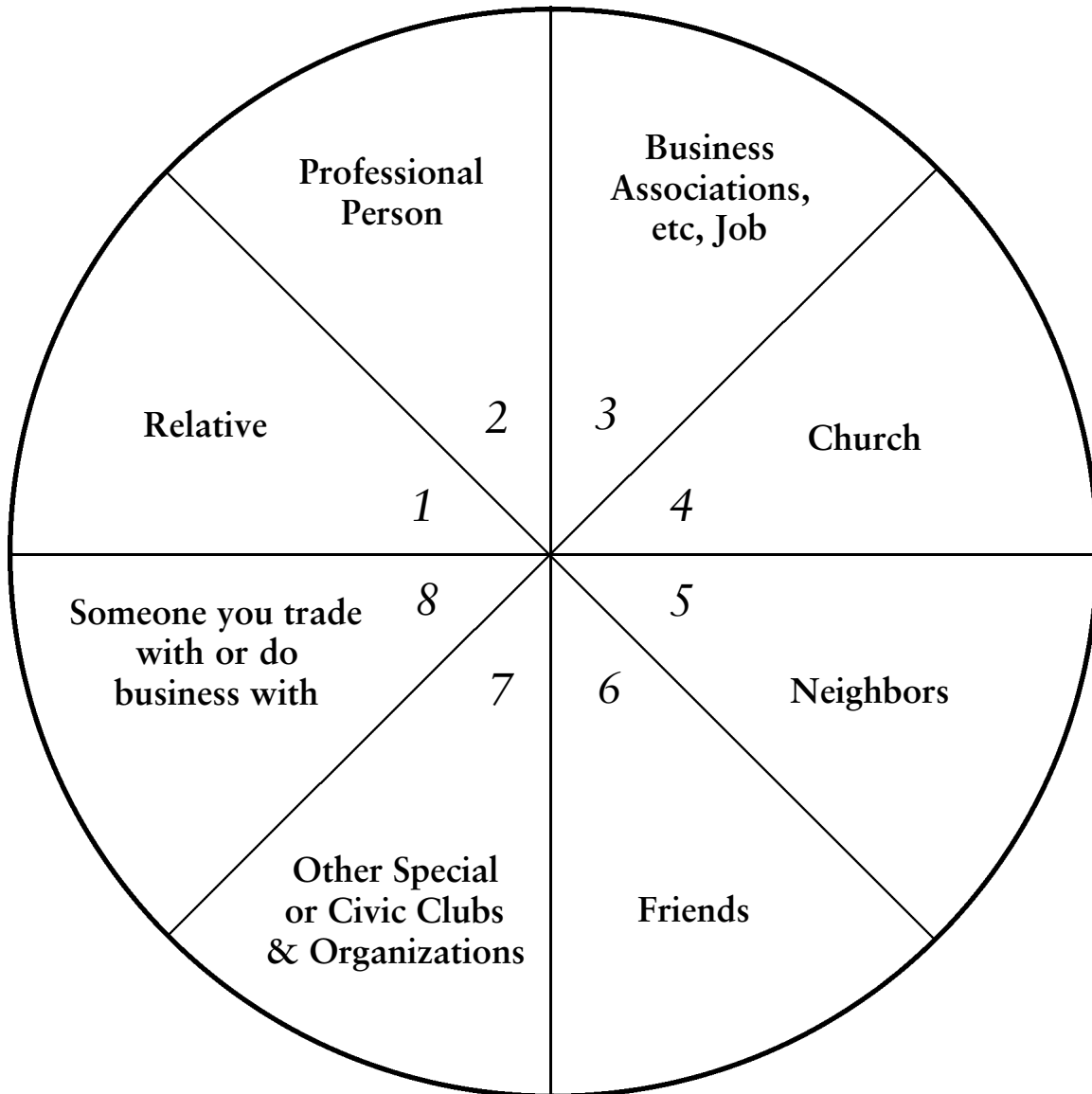
## An Excellent Tool for Recommending New Members

Concept: Some people are not comfortable asking others to consider becoming a Lions club member, even if they wholeheartedly believe in the benefits of membership and want to share the experience with others. By using a prospecting list, all club members can participate in generating leads, but the actual recruiting can be done by individuals who truly enjoy asking others to become Lions.

### Steps to Success:

- **Create Lists:** At a regular club meeting, distribute prospecting and recruiting wheels and/or prospecting lists to each member (see examples). For each category on the wheel, have an experienced Lion ask the group “Who is the one?” *Example: Who is the one* relative in your family you feel would like to make a contribution to improve the community? Give club members a brief time to think about their choices and fill out the prospecting list as thoroughly as possible.
- **Collect Lists:** When all categories on the wheel are completed, collect the prospecting lists and give to the Membership Chairman.
- **Assign Prospects:** The Membership Chairman will review the lists and assign prospects to each designated recruiter. It is a good idea to limit recruiters to approximately five prospects each.
- **Tabulate Results:** After recruiters have contacted their prospects, results should be tabulated into categories – people interested in joining now, people interested in joining later and those who are not interested in membership. Names of those interested in joining later or not at all should be filed for future reference. (Remember to follow up with those interested in joining at another time!)
- **Hold Orientation Meeting:** Using the list of interested individuals, an orientation meeting can be scheduled with the Membership Chairman, recruiters and interested prospects. During the meeting, acquaint potential members with your club and its goals and build enthusiasm for joining the club. Keep the meetings interesting, lively and informative. You may want to plan a few orientation meetings so as not to overwhelm prospects with a great deal of information. It is also wise to respect potential members’ time, and limit the duration of the meetings to about an hour.
- **Introduce New Members:** After the orientation meetings, introduce prospects to your club and begin the involvement process. It is especially important during the first meeting that your club’s atmosphere is welcoming and inviting. You want to make sure that your recruiting efforts aren’t wasted by turning off potential members during this last, critical step. Properly inducting, orienting and involving members will go a long way in keeping them involved and interested in your club!

# *The Recruiting Wheel*



# Lions Club Membership Prospecting List

Club Name: \_\_\_\_\_ Nominator: \_\_\_\_\_ Date: \_\_\_\_\_

## 1. Relative

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

Address: \_\_\_\_\_ Marital Status: \_\_\_\_\_ # of Children: \_\_\_\_\_

City, State and Zip Code: \_\_\_\_\_

Length of Time in Community: \_\_\_\_\_

Phone: (business) \_\_\_\_\_ (residence) \_\_\_\_\_

## 2. Professional Person

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

Address: \_\_\_\_\_ Marital Status: \_\_\_\_\_ # of Children: \_\_\_\_\_

City, State and Zip Code: \_\_\_\_\_

Length of Time in Community: \_\_\_\_\_

Phone: (business) \_\_\_\_\_ (residence) \_\_\_\_\_

## 3. Job

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

Address: \_\_\_\_\_ Marital Status: \_\_\_\_\_ # of Children: \_\_\_\_\_

City, State and Zip Code: \_\_\_\_\_

Length of Time in Community: \_\_\_\_\_

Phone: (business) \_\_\_\_\_ (residence) \_\_\_\_\_

## 4. Church

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

Address: \_\_\_\_\_ Marital Status: \_\_\_\_\_ # of Children: \_\_\_\_\_

City, State and Zip Code: \_\_\_\_\_

Length of Time in Community: \_\_\_\_\_

Phone: (business) \_\_\_\_\_ (residence) \_\_\_\_\_

**5. Neighbor**

Name: \_\_\_\_\_ Occupation: \_\_\_\_\_  
Address: \_\_\_\_\_ Marital Status: \_\_\_\_\_ # of Children: \_\_\_\_\_  
City, State and Zip Code: \_\_\_\_\_  
Length of Time in Community: \_\_\_\_\_  
Phone: (business) \_\_\_\_\_ (residence) \_\_\_\_\_

**6. Friend**

Name: \_\_\_\_\_ Occupation: \_\_\_\_\_  
Address: \_\_\_\_\_ Marital Status: \_\_\_\_\_ # of Children: \_\_\_\_\_  
City, State and Zip Code: \_\_\_\_\_  
Length of Time in Community: \_\_\_\_\_  
Phone: (business) \_\_\_\_\_ (residence) \_\_\_\_\_

**7. Other Civic or Social Organization**

Name: \_\_\_\_\_ Occupation: \_\_\_\_\_  
Address: \_\_\_\_\_ Marital Status: \_\_\_\_\_ # of Children: \_\_\_\_\_  
City, State and Zip Code: \_\_\_\_\_  
Length of Time in Community: \_\_\_\_\_  
Phone: (business) \_\_\_\_\_ (residence) \_\_\_\_\_

**8. Someone With Whom You Do Business**

Name: \_\_\_\_\_ Occupation: \_\_\_\_\_  
Address: \_\_\_\_\_ Marital Status: \_\_\_\_\_ # of Children: \_\_\_\_\_  
City, State and Zip Code: \_\_\_\_\_  
Length of Time in Community: \_\_\_\_\_  
Phone: (business) \_\_\_\_\_ (residence) \_\_\_\_\_



**NEW CLUBS AND MARKETING DEPARTMENT**  
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