

Training for New Presidents



Officer Training Guide District 17- I

By Lions Ken Leander and Gary Schneider

AGENDA

- 6 “Secrets” to a Successful Club Year
- Duties of the Club President
- Club Organization
- Planning Your Year
- Goals for Your Club

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- **Club Committees**
- **Projects – International, State & Club**
- **Club Budget**
- **Conducting Club & Board Meetings**
- **Motivating Your Club Members**
- **Hints on Running Your Club**
- **Solving Club Problems**
- **The End of Your Year**

6 “SECRETS” TO A SUCCESSFUL YEAR

1. **Hold a planning meeting and set goals for the year**
2. **Lead by Example – be enthused, involved and work hard**
3. **Ensure there is a good program for every meeting**

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4. **Follow and agenda for meetings; start and stop on time**
5. **Take on one new project this year**
6. **Have Fun!**

DUTIES OF THE CLUB PRESIDENT

- **Read the Club President Manual.**
- **Hold a planning meeting; set your GOALS for the year.**
- **Work with Board to prepare Administrative and Activities BUDGETS.**
- **Ensure that a PROGRAM has been arranged for each club meeting.**

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- **Call meetings to order PROMPTLY; follow an AGENDA.**
- **Conduct regular monthly Board of Directors' meetings.**

DUTIES OF THE CLUB PRESIDENT

- **Follow the Rules of Parliamentary Procedure.**
- **Require COMMITTEE REPORTS to the Board of Directors each month and to the club each quarter.**
- **See that your club is operating in accordance with International, State, District, and Club Constitutions.**
- **Have an AUDIT made of the club financial records at the end of the club year.**

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- **Attend Zone Meetings and make a report.**
- **Attend Cabinet Meetings to keep informed.**

THE BOARD OF DIRECTORS

The Board of Directors typically consists of the following:

- **President**
- **Immediate Past President**
- **First, Second, and Third Vice Presidents**
- **Secretary**
- **Treasurer**
- **Tail Twister**

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- **Lion Tamer**
- **2 – One Year Directors**
- **2 – Two Year Directors**
- **Membership Director**

DUTIES OF THE IMMEDIATE PAST PRESIDENT

The Immediate Past President and other past presidents shall officially greet members and their guests at club meetings.

The Immediate Past President shall represent the club in welcoming all new service-minded people in the community served by the club.

VICE PRESIDENTS

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The duties of the Vice Presidents are as follows:

- **The Vice Presidents shall oversee the functioning of such committees as the President may designate.**
- **The Vice Presidents shall assume, in the order of their rank, the duties of the President in his/her absence.**

DUTIES OF THE CLUB SECRETARY

- **Submitting regular monthly and other reports.**
- **Being an active member of the District Governor's Advisory Committee.**
- **Keeping and maintaining general records of the club members.**
- **Issuing statements to each member for dues and other financial obligations. Collecting the same and turning it over to the Treasurer.**

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- **Giving bond for faithful discharge of his/her office.**

Submitting required Reports:

- **Monthly Membership Report (C-23-A) (can report on-line)**
- **Club Activity Report (A-1) (can report on-line)**
- **PU-101 (Yearly) (can report on-line)**
- **IRS Form 990 (Yearly, if required, by November 15)**

Maintaining club member records:

- **Record of club service**
- **Record of meeting attendance**

Obtaining awards for club members:

- **Perfect Attendance Award**

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TREASURER

- **Receive all monies from the Secretary or otherwise and deposit in the club's designated bank.**
- **Pay out monies in payment of club obligations at the direction of the Board of Directors.**
- **Keep and maintain general records of the club receipts and disbursements.**
- **Submit regular financial reports.**
- **Give bond for faithful discharge of his/her office.**

LION TAMER

- **Be responsible for the club property and paraphernalia.**

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- Act as sergeant-at-arms at meetings of the club.
- See that those present at meetings are properly seated.
- Distribute literature as required at club meetings.
- Make sure that new members meet all of the club members.

Read the “Functions and Duties of the Lion Tamer” information sheet in the club president’s packet.

TAIL TWISTER

- Promote harmony, good fellowship, life and enthusiasm at the club meetings.
- Accomplish this by stunts, games, quizzes, and imposing judicious fines on club members.
- All monies collected shall be turned over to the Club Treasurer.

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Read the “Functions and Duties of the Tail Twister” information sheet in the club president’s packet.

GREETER

- Designate a Greeter to greet club members when they arrive at the meeting place.
- Normally this should be one or more of the past presidents.
- Introduce new members to the general membership.
- Make all members and new members feel welcome at each meeting.
- Arrange for each new member and guest to wear a “New Member” or “Visitor” badge.
- Greeters should be present at all Lions functions.

MEMBERSHIP DIRECTOR

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- **Serve as chairperson of the membership committee.**
- **Develop a club growth program. Present to the Board of Directors for approval.**
- **Encourage recruiting of quality new members at club meetings.**
- **Prepare and implement Orientation Sessions for new members.**
- **Report to the Board of Directors ways to reduce loss of members.**
- **Serve as a member of the Zone level membership committee.**
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BOARD OF DIRECTORS

- **Shape, establish, and execute the policies of the club.**
- **Authorize all club expenditures.**
- **Have books and records audited at least annually.**

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- **Appoint a bank or banks for deposit of club funds.**
- **Appoint the surety for bonding of any club officer.**
- **Not authorize or permit expenditure of activities funds for administrative purposes.**
- **Appoint and approve, subject to club membership approval, delegates and alternates to conventions.**
- **Stand by, live with, and work with the club throughout the year. Take time to perform official duties properly.**
- **The Board of Directors has the power to modify, override, or rescind the action of any club officer.**

PLANNING YOUR YEAR

Conduct a Strategic Planning Session by June 15.

- **Set Goals for your club.**

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- Make Committee Assignments.
- Establish Club Projects.
- Draft a Club Budget (Administrative and Activities)
- Determine a Meeting/Program Schedule.

Hint: This is the #1 “Secret” for having a successful year – a planning meeting & setting goals.

GOALS

Goals should be S.M.A.R.T. (Specific, Measurable, Accountable, Realistic, and Time)

Goals should answer these questions:

- What will be accomplished by the club during the year?

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- **Who will be responsible for seeing that it gets done?**
- **When will it be completed?**
- **Will membership and resources support the goal?**
- **Will the community support or need the goal?**

Periodically evaluate progress in achieving the goals.

CLUB COMMITTEES

There are two types of Lions Club Committees:

- **Administrative**
- **Activities**

Committees appointed should be active committees and perform a needed function.

Appoint committee chairpersons willing and able to direct the functioning of the committee.

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AMINISTRATIVE COMMITTEES

- **Membership committee**
- **Publicity committee**
- **Finance and Budget committee**
- _____
- _____

ACTIVITY COMMITTEES

- **Sight Conservation committee**

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- **Social Services committee**
- **Scholarship committee**
- **Pancake and Sausage Feed Committee**
- _____
- _____

CLUB PROJECTS

As part of your Strategic Planning, a review of all club projects should be conducted.

Service Projects

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- Is the Service Project needed?
- Is the Service Project wanted?
- Is anybody else doing it?

Fund Raising Projects

- Do records indicate existing fund raisers are viable?
- Are existing fund raisers adequate to support projects?
- Are additional fund raising projects needed?
- Is it worth the effort?

Refer to “Making It Happen – Guide to Club Project Development” from LCI

Hint: This is the #5 “Secret” for having a successful year – Take on one new project.

STATE PROJECTS

Your club should be aware of and support these:

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Kansas Lions Sight Foundation (KLSF) (\$1.50/member contribution for administration)

- Candy Day
- Eyeglass Collection
- Screening Bus

Kansas Lions Band Foundation (KLBF) (\$1.50/member contribution for administration)

- State and International convention bands
- Band uniforms

INTERNATIONAL PROJECTS

Lions Club International Foundation (LCIF)

- Melvin Jones Fellowship
- \$1,000

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- Disaster relief provided to Kansas and around the world

Sight First

- Campaign – Fund raising program to fight blindness worldwide
- Current and future services

Did you know that the # 3 reason Lions drop their membership is because of Lack of Involvement? Involve as many members as possible in your projects.

THE CLUB BUDGET

There are two types of accounts (funds) for handling club monies:

- Administrative
- Activity

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Money required for the operation of the club MUST be obtained from dues (this is the Administrative Fund).

Money obtained from public solicitations and fund raising projects shall ONLY be used for the Activity Fund.

CONTROL OF CLUB MEETINGS

- **The President must be the Presiding Officer**
- **Be prepared for your meeting; Have and use an agenda**
- **Start and adjourn the meeting on time**
- **The meeting must have a purpose**

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- **Follow parliamentary procedure**
 - **Motions, seconds, amendments, discussion, voting**
- **Appoint the secretary to record the minutes of the meeting for future reference**

Did you know that the # 1 reason Lions drop their membership is because of lengthy and boring meetings? Follow the steps above to control your meetings.

HAVE AN AGENDA

- **Club Meeting Agenda**
- **Board of Directors Meeting Agenda**
- **Follow the same basic agenda for each meeting**
- **See the samples that follow; use or modify as needed**

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Hint: This is the #4 “Secret” for having a successful year – Follow an agenda and stick to it.

Did you know that the # 2 reason Lions drop their membership is because of club politics and cliques? Increasing the involvement of all members and controlling meetings are good ways to combat this problem.

CLUB PROGRAMS

Develop better programs for your meetings.

- **A program must be arranged for every Lions Club meeting.**
- **Responsibility for arranging the club program:**
 - **Vice Presidents**
 - **Program Chairperson/Committee**
 - **Members**

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- **Types of programs to avoid:**
 - **Controversial topics**
 - **Solicitations of Infomercials**

Hint: This is the #3 “Secret” for having a successful year – a good program at every meeting.

Sources for your club to consider are:

- **Zone Chairman**
- **District Chairpersons**
- **Lions from other clubs**
- _____

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- _____
- _____

PROTOCOL

Items to consider when hosting a special Lions Club Meeting

- **Decide on head table seating arrangements before the meeting.**
- **Head table should be served first.**
- **Recognize distinguished guests.**
- **Make sure the American Flag and the Club Flag/Banner are located in their proper positions.**
- **Be aware of the District Governor's visit to your club:**
 - **The DG is the program for that club meeting**
 - **Notify the DG if there is a schedule conflict**

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MOTIVATING YOUR CLUB

The points a President must remember when motivating club members are to:

- Provide Leadership
- Be informed about Lions
- Be prepared
- Establish a plan with a set of goals
- Maintain contact with your club members
- Involve club members
- Recognize club members' efforts

Hint: This is the #2 “Secret” for having a successful year – Lead by Example.

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GETTING VOLUNTEERS

The secrets of getting volunteers:

- **Ask, Ask, Ask**
- **Advance notification**
- **One-on-one contact**
- **Believe in the project yourself**
- **Participate yourself**
- **Enlist the spouse's help**
- **Recognize past participation**

Did you know that most 25-40 year olds will join and help with projects if they are only asked to give 3-4 hours per month? Don't ignore them or overwhelm them and they will be part of your club.

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CLUB PROBLEMS

Solving problems in your club:

- **Be aware of problems occurring in your club.**
- **Identify club problems.**
- **Resolve problems and establish policy with the direction of the Board of Directors.**
- **Inform club members of the results of any Board of Directors' action.**

GETTING NEW MEMBERS

The biggest reason more persons don't join Lions:

- **No one asked.**
- **No club membership plan.**

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Develop an action plan for getting new members:

- **Identify the characteristics of an ideal Lions Club member.**
- **Identify the best source of candidates with these characteristics.**
- **Develop recruiting tools (brochures, flyers, business cards, wear your pin, etc.)**
- **Use good recruiting techniques (ask one-on-one or in recruiting teams)**

KEEPING NEW MEMBERS

Remember the five I's to keeping new members:

- 1. Invite (ask)**
- 2. Induct (orientation)**
- 3. Indoctrinate (participate in zone and district activities)**
- 4. Involve (work on a project)**

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5. Inform (communicate in person and by newsletters)

People become (and stay) members by choice – not by chance.

CLUB LIABILITY PROTECTION

Lions International carries a general liability insurance policy.

- **ACE American Insurance. Report Claims promptly by calling (888) 832-3747.**
- **Insures Lions clubs and their members while acting in volunteer capacity.**
- **Applies to club functions and activities.**
 - **\$1,000,000 liability limit for one occurrence**
 - **\$2,000,000 annual generate aggregate limit per club**
 - **\$1,000 per person medical expense**
 - **There are some exclusions; check insurance booklet**

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- **Project must be listed in meeting minutes and on the Club Activity Report.**
- **Booklet on insurance program furnished to secretary each year.**
- **Notify Lions International of major projects.**

END OF YOUR CLUB YEAR

At the end of your year as Club President:

- **Appoint a Nominating Committee.**
 - **Nominating Committee is required to meet in March (Ten days prior notification to club members required.)**
 - **Club's election to be held no later than April 15. (Two weeks prior notification to club members required.)**
 - **Review Club Constitution and By-Laws for details.**

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- **Plan and conduct an Installation of Officers/Appreciation dinner.**
 - **Properly install new club officers with a dignified ceremony.**
 - **Summarize the accomplishments of your year.**
 - **Recognize and compliment the club members that helped make the year a success.**
- **Make application for the President's Excellence Award.**
 - **The application for the President's Excellence Award is included in the president's packet.**
 - **The application should be completed by the Secretary and approved by District Officers.**
 - **Be aware of the requirements of the 100% President's Award.**
- **The 100% Secretary Award.**
 - **Applied for by the club president.**

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- Application submitted to the District Governor and states that the secretary has fulfilled the necessary requirements.

Hint: Don't Forget "Secret" #6 for having a successful year – Have Fun!