



# Club Branch Guide

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**Lions Clubs International**





## Why Organize a Club Branch?

A club branch enables your club an opportunity to expand your membership into new areas or activities with a small group of people who want to make a difference in their community. Club branch members are part of the existing “parent” club, but have the flexibility to hold independent meetings and service projects. Forming a branch will allow your club the ability to expand your membership to people who cannot attend parent club meeting because of timing, geographic location, or those who wish for a different meeting format, such as virtual, or a more or less formal meeting than what your club offers. A club branch also may attract a new type of Lion as part of your branch, such as young professionals, working parents with young children, or other types of people. Club branches also engage people of different service interests, and could form as a specialty club branch. Forming a club branch is a way that offers flexibility when attracting others to get involved in service through Lions.

Your club will be recognized with a banner patch when you start a new club branch. Also, your branch liaison will be recognized with a lapel pin.



# Steps to Club Branch Formation:

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## 1) Pre-game:

Notify the district governor any clubs that may serve the same community of the intention to form a club branch. The formation of your branch could be protested, according to the same rules and procedures for protesting the formation of a Lions club. Notification and collaboration is important to fostering good will within your district.

## 2) Create the club branch plan by considering:

### a. Where will the branch be located?

Branches may be formed anywhere within your district. A good way to start would be to identify unmet community needs. Consider conducting a community needs assessment to identify needs that could be addressed, or by surveying your existing members to see if there is a need they are aware of and passionate about. If your member can recruit a small group of people to rally around this cause, then he/she could also start a club branch to focus on this issue.

### b. Who will the branch consist of?

Branches need to have at least five members to get started. These members can be made up of existing members of your own club, as well as additional community members that can be attracted to the opportunity to serve as a Lion in the club branch. Some suggestions could be a group of young professionals who cannot make club meetings, local cultural communities, or other groups of people in the community who would be interested in community service.

### c. Will the branch have a specialty?

Determine whether your branch will have a specific focus, or specialty. This could be done along with determining the location of the branch, and who it will consist of. Will your branch address community needs as they arise, or will they have a special focus, such as diabetes awareness?

## 3) Recruit Members

When developing a list of potential members, consult with your district officers, local merchants, and contacts that your club members have in the community. Reference the Just Ask! New Member Recruiting Guide for Clubs to help guide you through the recruitment process. This guide is geared toward overall club growth, and its strategies will work well in helping recruit members to a new club branch.



## 4) Host an information meeting

Informational meetings are intended for Lions to meet with potential members and discuss the benefits of forming a branch. The meeting should generate interest in becoming a Lion. Consider the meeting expectations of your branch members when planning the informational meeting. If a branch is planning on meeting virtually, perhaps an online informational meeting may be appropriate. Some informational meeting discussion topics may include:

- The benefits of addressing a community need through Lions
- Examples of parent club projects and potential club branch projects
- The support that the club branch would be given by the parent club, as well as the district, multiple district, and International Headquarters.
- Testimonials from parent club members explaining the benefits they have received as a member of a Lions club.
- Completing Membership Applications

Be sure that you have contact information for participants, and after the meeting, thank them for their time, confirm their interest and invite them to attend an organizational meeting. Encourage them to bring friends, family or co-workers who may be interested in joining the branch. Additional information for informational meetings can be found in the New Club Development Guide.

Hosting a service event in conjunction with an informational meeting could be a great way to attract potential members to the club branch and educate them on what a Lions club can do! This also may be more attractive to certain types of volunteers who are not attracted to the traditional meeting structure of Lions clubs, but are interested in service.

## 5) Host an Organizational Meeting

An organizational meeting is the first meeting of the proposed branch. Attendees include potential members and may also include others, such as parent club representatives, district officers, and other interested people. The parent club president, proposed branch liaison or other qualified lion may conduct the organizational meeting. Some organizational meeting topics should include but are not limited to:

- Information about club branch operations
- Membership responsibilities
- Structure and history of Lions Clubs International
- Explanations of each office
- Club Branch Dues
- Club Branch Name
- Club Branch officer elections
  - i. Liaison (appointed by the parent club)
  - ii. President (elected by club branch members)
  - iii. Secretary (elected by club branch members)
  - iv. Treasurer (elected by club branch members)

Club Branches must follow the same naming conventions as new Lions Clubs. Club branches will automatically receive the moniker “Club Branch” at the end of their name. Naming conventions dictate that the club name shall start with the “municipality” in which it is located, followed by a “distinguishing designation”. For a full description of naming conventions, please read the Lions Clubs International Board Policy Manual, Chapter X.



## 6) Submit the notification of Club Branch

After the organizational meeting, the parent club secretary or president can use MyLCI to submit club branch information to Lions Club International. Instructions for submitting a club branch can be found on LionsClubs.org. Alternatively, you may complete both the Club Branch Application/ Officer Update and the Report of Branch Membership and submit completed forms to Lions Clubs International.

# Parent Club Roles and Responsibilities

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It is the role of the parent club to assist the branch in obtaining and maintaining a high level of commitment, activity and enthusiasm. The success of your club branch will require guidance and collaboration with the parent club.

The parent club is required to:

- Assist in the formation of the branch
- Appoint an experienced Lion to be the branch liaison
- Apply for the club branch via MyLCI or submit the Club Branch Application.
- Report the members of the branch via MyLCI or the Report of Branch Membership
- Process membership applications for additional club branch members.
- Ensure the branch
  - i. Develops a membership growth plan
  - ii. Officers are properly trained, oriented, and supported
  - iii. Hold officer elections each year
  - iv. Members feel encouraged to participate in parent club meetings and activities
  - v. Members feel encouraged to participate in district activities and events
- Submit club branch supply orders
- Update branch officers on an annual basis through MyLCI or via the Club Branch Application/Officer Update



# Club Branch Structure

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## Club Branch Executive Committee

The club branch executive committee is made up of the club branch officers (branch president, branch secretary, branch treasurer) and the branch liaison. Initial branch members may serve until the close of the first fiscal year, and may serve through the second year if re-elected. The fiscal year for Lions Clubs International is July 1 to June 30. The position of branch president is not a prerequisite for any district service position.

### Club Branch President

- Serve as the leader of the branch.
- Serve on the parent club's board of directors
- Attend board meetings and/or general meetings of the parent club
- Become familiar with the parent club's constitution and bylaws.
- Regularly communicate with the parent club
- Establish a plan for the first year
- Form committees to support club branch operations
- Preside over club branch meetings
- Plan and select community service activities

### Club Branch Secretary

- Serve as the administrator of the branch
- Maintain general records of the club such as minutes, attendance, elections and membership.
- Submit new members, member drops, transfer member and other membership changes to the parent club using the Report of Branch Membership
- Submit officer updates to the parent club on an annual basis using the Club Branch Application/Officer Update

- Prepare and provide a report of branch activities to the parent club using the Monthly Branch Activity Report
- Collect and turn dues into the club branch treasurer
- Issue statements to each member for dues and other financial obligations owed the parent club.
- Serve as the editor, or communicate regularly with the editor of the branch newsletter
- Respond to inquiries and requests made to the branch

### Club Branch Treasurer

- Create and manage branch accounts and budgets
- Record payments and deposits for the branch
- Prepare the Monthly Financial Report and submit it to the parent club.
- Receive dues money from the branch secretary
- Pay branch bills
- Submit international, multiple district and district dues to the parent club treasurer and deposit club branch dues into the branch administrative account.

### Branch Liaison

- Serve as an officer of the club branch's executive committee
- Maintain open communication between the parent club and the club branch
- Provide assistance to the branch, similar to that of a Guiding Lion
- Develop a positive relationship with members of the branch.
- Help the branch president prepare the Monthly Branch Activity Report
- Keep the branch aware of all parent club activities and policies that will affect the branch.
- Attend branch meetings and service activities.



## Club Branch Membership

### Branch Member

Any person of legal majority with good character and good reputation in his or her community may be invited to become a club branch member. The person must have approval from the parent club to become a member.

Members of the branch are encouraged to attend the general meetings of the parent club. Branch members are voting members of the parent club when in attendance at parent club meetings. Branch members are only counted in the parent club's quorum when present at the parent club meetings. Branch members also may serve on branch committees. Any branch member may serve on the parent club's board of directors if elected.

### Dues

The entrance fee for each new club branch member is US\$35. Current members from other clubs or individuals who left a lions club in good standing within 12 months may transfer to the branch at no charge.

Branch members pay international, district and multiple district dues, along with club branch dues. A branch may set club dues which are different than those of the parent club. International district and multiple district dues are given to the parent club treasurer and club branch dues are deposited into the club branch administrative account.

Discounts are available for qualifying family units, students, current or former Leos and young adults.

## Adding a New Member

When adding a new member to the club branch, the Membership Application should be submitted for approval by the parent club's board of directors. The parent club then either submits the Report of Branch membership with the Monthly Membership Report, or enters the member online using MyLCI.

New Member Kits are available from the Club Supplies Department and should be ordered by the parent club secretary for each new club branch member.

## Membership Changes

When dropping a member or updating membership information, fill out the Report of Branch Membership and submit to the parent club secretary.





## Club Branch Operations

### Meetings

Lions clubs are encouraged to meet at least twice a month, and club branches are encouraged to do the same. Some branches have one general meeting and one executive committee meeting in each month. Well planned meetings are important, and for information on planning a meeting, the Club President and First Vice President e-Book is a good resource.

### Constitution and By-Laws

Since the branch is a part of the parent club, it is governed by the parent club's constitution and by-laws as well as the constitution and by-laws of the international association, multiple district and district, along with policies adopted by the International Board of Directors.

### Communications

Each club branch needs to have its own method of communication to its members. Consider a newsletter, Facebook page or blog. Often the club branch secretary has the responsibility of communicating with club

branch members.

### Membership Development

A successful club branch will have satisfied and active members, as well as a plan to attract additional members to help increase their service capacity. Recruiting for a club branch is similar to recruiting for a traditional club. The Just Ask! New Member Recruiting Guide outlines a process for membership development and is a great resource for clubs and club branches looking to increase membership.

You can also consult your branch liaison and parent club officers for additional idea. You can use the Club Branch Brochure to explain to potential members what a club branch is, or use the Club Brochure Template to customize a brochure specifically for your club.

Once the members join your branch, the Membership Satisfaction guide will help ensure your members are getting the



experience they expect from your club.

## **Branch Financing**

### **Budget**

Most branches use the budget system of financing, which includes anticipating in advance the income and expenses of the branch for a specific period, then preparing a budget.

Your Branch should have two budgets for the fiscal year (July-June):

- 1) Administrative Budget: The administrative budget finances branch operations. Its income will mainly consist of dues, however, it may also include club raffles, increased meal costs, club fines and club auctions.
- 2) Activities Budget: The activities budget finances the branch's activities and projects. Its income should come from special fundraising projects organized by the branch in the community.

Club Branches may open their own accounts, and may choose whether or not to give authorization to the parent club. Either way, the branch shall provide the Monthly Branch Financial Report so the parent club can continue to give support and guidance to the branch. Remember, the district, multiple district, and international dues will be paid by the parent club, so funds will

need to be transferred if the parent club does not have access to branch accounts.

In the USA a branch has two options for obtaining an Employer Identification Number (EIN), used to open a bank account.

- 1) Use the EIN from the parent club. The club branch, with permission of the parent club, can use the parent club's EIN. This would make the parent club responsible for reporting income of the branch to the IRS on its taxes. The branch will maintain control over the account, however, must provide tax information to the parent club.
- 2) Apply for a new EIN number. If a club branch chooses to apply for their own EIN, the branch must file a 990-N, 990-EZ, or 990 annually. Apply for an EIN at [www.irs.gov/charities](http://www.irs.gov/charities).

For additional support, contact [legal@lionsclubs.org](mailto:legal@lionsclubs.org)

## **Fundraising**

Money earned from fundraising must be used for the branch's activities budget. Under no circumstances can any of the income from the branch's fundraising projects be used to defray branch administrative costs: However, legitimate



expenses directly related the fundraiser can be deducted.

### **Ordering Club Supplies**

To order Lions Clubs International branded merchandise, club supplies and awards, browse LCI's online store. Items that do not require personalization may be ordered directly from International Headquarters with a credit card or other advance payment. Items personalized with the club branch name must be ordered through the parent club. Only the parent club secretary may order supplies on an account.

### **Converting from a Club Branch to a Lions Club**

If the parent club wishes to convert their club branch to a chartered club, they may do this if the branch is at least 20 members. When club branches convert to a Lions Club, charter and transfer fees are waived for existing branch members. Contact [NewClubs@lionsclubs.org](mailto:NewClubs@lionsclubs.org) to begin the process for converting.

Any money remaining in a club branch's accounts when the branch converts into a chartered club shall be transferred to the accounts of the newly chartered Lions club. The transfer members when a branch converts does not impact the eligibility of the

parent club in regards to the Membership Satisfaction Award.

### **Dissolving a Club Branch**

A club branch may be dissolved by a majority vote of the entire membership of the parent club, including club branch members. If the branch is dissolved, the branch members become active members of the parent club, and should continue to be encouraged to participate in parent club meetings and activities. The parent club may dissolve a club branch on MyLCI, or through written communication from a parent club officer to [NewClubs@lionsclubs.org](mailto:NewClubs@lionsclubs.org) at International Headquarters announcing the club branch has dissolved.

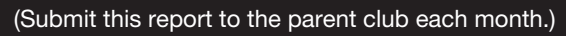
Any money remaining in a club branch's account when the branch dissolves shall be transferred into the parent club's relative account to be used in the club branch community.

### **Additional Support**

Lions Clubs International has additional resources and support available for your club branch. Contact [membership@lionsclubs.org](mailto:membership@lionsclubs.org), or visit the membership section in the resource center on <http://lionsclubs.org> for additional tools.





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(Submit this report to the parent club each month.)

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## Lions Clubs International

### Membership Division

Lions Clubs International

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Oak Brook IL 60523-8842 USA

[www.lionsclubs.org](http://www.lionsclubs.org)

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