

# MERL: Teamwork for Growth





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## INTRODUCTION

**Growth** is a common theme for many notable historic leaders. The following four leaders were involved in growing plants or trees, developing new varieties, increasing the number of trees, and preserving historic unique trees for the future.

- **Johnny Appleseed** traveled near home and far away starting new apple trees by planting seeds or seedlings. He recognized the necessity for new growth.
- **W. Altee Burpee** was a skilled gardener, testing new varieties of vegetables and producing seeds to sell to others. He created new varieties based on successful production results.
- **J. Sterling Morton** had a vision of Nebraska with trees. He shared his vision and recruited followers each time he spoke to a group about planting trees. He began a new celebration and organization, Arbor Day. The organization provided education about the value of planting trees and provided resources for doing just that every spring.
- **William Kent** purchased property because he saw the value for future generations in preserving a special forest. This property is now known as Muir Woods, location of the massive California redwood trees.

Like these historic leaders, the MERL team members each focus on their own distinct responsibilities: membership growth using varied recruitment methods, starting new clubs and supporting them to become strong, member retention by providing value to club members by meeting current and future needs, and leadership development that trains and inspires member development to ensure leaders for future growth of the association. They each work in different ways, with different groups, to achieve membership growth and leadership development in Lions clubs. Their personal skills and motivation will vary, but they share a vision of future growth in Lions clubs locally and internationally.

*Team Definition: A group of individuals working together for a common purpose, who must rely on each other to achieve mutually defined results.*

This manual is for members of a MERL team, who work together to define a shared vision of the future, create goals/objectives, and develop action plans to achieve results. Effective MERL teams will secure our association's future through sustained membership growth, new club development, increased member retention and quality leadership development.

## **GLOBAL MEMBERSHIP TEAM**

The Global Membership Team (GMT) is a group of Lions leaders representing the seven constitutional areas. GMT leaders are appointed by the international president in consultation with the executive officers. Each GMT leader has committed to serving a three-year term and is subject to an annual performance review.

The GMT area leaders (39) will report to the Executive Council which consists of: the International President acting as GMT Chairperson, the First Vice President acting as GMT Vice Chairperson, the Second Vice President, Immediate Past International President, the Membership Development and the Leadership Committees' chairpersons, a GMT International Coordinator, the LCI Executive Director, and nine Constitutional Area leaders.

GMT member's responsibilities include: being a resource on LCI membership initiatives, mentoring district governors, working with the MD MERL teams to develop individual plans for membership, extension, retention and leadership development and to provide general assistance and support to districts to achieve district membership growth goals.

## **MERL TEAM COMPOSITION & PURPOSE**

### **Team Members**

This section defines the four standard functions that are included in the team as well as other functions that could be added. Each function has a chairperson primarily responsible for that function. The four key functional responsibilities of the MERL team are:

- Membership
- Extension
- Retention
- Leadership Development

Teams may include other functions/chairpersons based on multiple district or district needs or based on local custom. Examples of additional team members include:

Campus Club Chairperson                      Guiding Lions  
Orientation Chairperson                      Public Relations Chairperson  
Women's Development & Participation Chairperson

Each of the four chairpersons or team functions (membership, extension, retention and leadership development) may have a sub-committee dedicated to fulfill its designated responsibilities. Members of the sub-committee may vary from year to year depending on the specific objectives and accountabilities.

The team coordinator (optional position) may be one of the MERL team members or another qualified Lion leader who is appointed by the council of governors for the multiple district MERL team or by the district governor for the district MERL team. The team coordinator provides support and promotes communication and collaboration among team members.

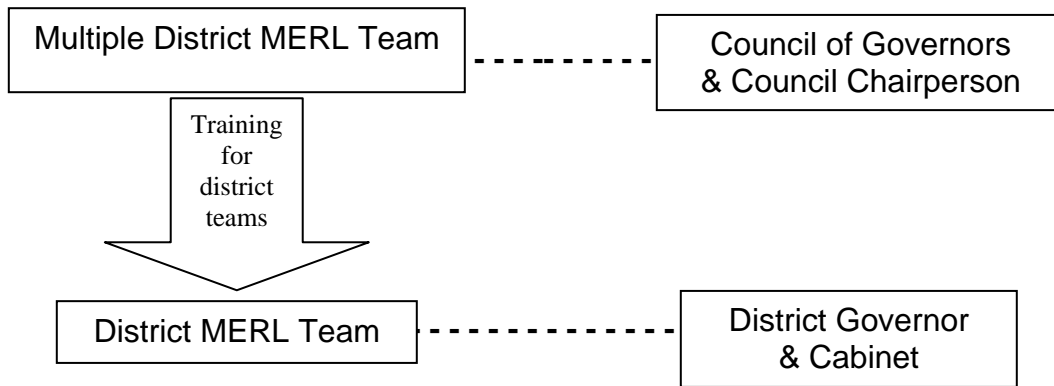
**MERL TEAM STRUCTURE**

In the Lions Clubs International structure as detailed in the Board Policy Manual, there are two levels of MERL teams and each team collaborates with other Lion leaders.

- | <b>Team</b>  | <b>Collaboration with Lion leaders</b>                                    |
|--|---|
| <ul style="list-style-type: none"><li>• Multiple district team</li><li>• District team</li></ul> | Council of governors & council chairperson<br>District governor & cabinet |

**Multiple District Level**

The Multiple District MERL team receives training at an LCI sponsored seminar during the first year of their term. The team establishes a vision statement for the multiple district, and creates goals that will accomplish this vision during their three-year term. The team does its work in consultation with the council of governors.



**District Level**

The district MERL team receives direction, training and inspiration from the multiple district MERL team. The communication of multiple district goals and action plans establish priorities for the districts. Districts may have additional priorities depending on their district goals. The district MERL team works in cooperation with the district governor and the district cabinet.

Remember that the multiple district MERL team provides overall direction and priorities for creating district MERL team goals and objectives. It is important to be moving in the same direction within your multiple district. You may benefit from the efforts and energy of others. An example of this is a collaborative public relations program conducted by several sub districts, building awareness throughout the entire multiple district. Districts that are covered by the same media outlet would need to coordinate their Lions clubs promotion efforts.

## **STRATEGIC PLANNING CYCLE**

This section explains the strategic planning cycle of analysis, definition of vision and goals; followed by review/evaluation. Illustrations are given of each of the following: trend/data analysis, vision statement, 3-year goals/objectives, action plan, and the review process.

### **ANALYZE DATA & TRENDS**

This is the first step in planning: analyze environmental and organizational trends as well as current and historical membership data. Types of data to include are local population demographics, commercial trends, LCI membership summary, and other nonprofit organizations' annual reports.

You need information that will enable you to determine the strengths and weaknesses of Lions clubs in your district, and also to recognize threats and opportunities that would be relevant to Lions clubs. Assess the level of need for community service in your area. To adequately meet this need, how many clubs are necessary? In which locations or towns? How many members are needed?

### **DEFINE VISION**

Using the analysis information, describe the ideal future of Lions clubs in your area. A vision statement should be created for each function of the MERL team (membership, extension, retention and leadership development.) These four statements become the basis for developing a team vision statement.

A sample MERL team vision statement is shown below. Goals will reflect your vision statement and help you reach that future.

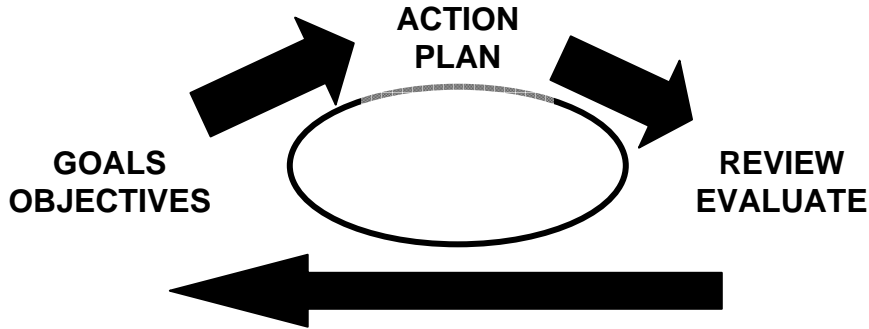
### **MERL Team Vision**

A vision statement states the desired future that the team would like to achieve. This vision statement should be shared and supported by all members of the team, be comprehensive and detailed, and be positive and inspiring. An example of a MERL team vision statement is:

*During our 3-year term as district MERL chairpersons, we will seek to build a harmonious team of leaders, including other district chairpersons, the governor, region and zone chairpersons. We will do this through regular communication in which we seek to empower others, goal-setting activities, and a series of combined professional quality mini-leadership seminars throughout the district. In all these ways and more, we will seek to raise the standards of leadership, increase membership through recruitment and new club development and enhance retention so that membership will grow by 5 percent.*

**ACCOMPLISH GOALS**

Accomplishing goals is a cyclical process beginning with the creation of goals with more focused short-term objectives. Each objective requires an action plan for accomplishment of the objective. Periodic review of results and progress toward achieving the objectives will allow for mid-year revisions, extending milestone dates or reprioritizing of objectives and goals.



The review process is essential to managing goals. If you lack results at the mid-year point, you can revise your action plans and goals/objectives instead of dropping them. Review the Goal Setting course on the LCI website for more information on managing goals.

**GOALS - OBJECTIVES - ACTION PLANS**

Let's follow the cycle of setting goals using some sample goals, objectives, and action plans. Goal statements should be specific, measurable, achievable, realistic, and time bound. Look at this example:

***To organize fifteen clubs in district SE by April 1, 2011.***

It is specific in stating what you will do, 15 is measurable, it is achievable, the team believes it is realistic and April 1, 2011 is the time limit.

Once a goal has been identified, you will create specific objectives that will contribute to the achievement of this goal. The individual objectives should follow the same format as a goal statement. Some sample **objectives** are listed below.

- To organize a campus club at Drake University by September 30, 2008
- To organize two New Century clubs in the metropolitan area by November 1, 2008
- To organize three Lioness Lions clubs by April 1, 2009
- To organize a Leo Lions club in Grandville by October 1, 2009
- To organize 4 interest focused clubs in the metropolitan area by November 1, 2009
- To organize two women's clubs in the metropolitan area by September 30, 2010
- To organize a family focused club in South Village by February 25, 2011
- To organize a campus club at North College by March 1, 2011

**Each objective requires an action plan** that specifies what action you plan to do in chronological sequence, how you will do it, who is responsible, time deadline for each action, and results that show you have completed the action. The action plan worksheet used below is included in the resources. The first page of a sample action plan follows for this objective: To organize two New Century clubs in the metropolitan area by 11/1/2008

<b>Action</b>	<b>Method</b>	<b>Who</b>	<b>Deadline</b>	<b>Results</b>
Conduct a community health fair Sept. 25	1. Contact medical professionals and Lions Clubs for assistance in running event	Zone chairperson, SightFirst, diabetes awareness chairpersons	Aug. 20	Staffing complete
	2. Promote attendance via information to schools, businesses, community calendars and media contacts	Public relations chairperson	Sept. 10	2000 attendance
	3. Provide public with information about Lions clubs and recruit members	Membership chairperson	Sept. 25	Potential member list
Sponsor coffee in business buildings	1. Contact building managers to arrange 2. Provide sight health & diabetes information Inform about Lions	Zone chairperson, membership chairperson	Sept. 10 Sept. 15 – Oct. 10	Potential member list

## TEAM DEVELOPMENT

Team development is a process of growth through four stages. Understanding and recognizing these stages will help your team move to the performing stage quickly. When a new member is added to the team, you may see some signs of stages 2 and 3 even though your team had previously achieved the performing stage of development.

### Stage 1 - Forming

Member selection should include the following factors:

- Experience and skills suited to the position responsibilities
- Interest in serving as a member of the team
- Demonstrated loyalty and commitment to organization
- Ability to communicate well
- Good social skills in relating to other people
- Personality compatible with other team members

### Stage 2 – Storming

Members may have conflicts initially due to power struggles or perceived superiority of experience or longevity of membership in the organization. Conflict is a normal part of growth in teamwork, however conflicts can be resolved through good listening skills and collaborative problem solving. By focusing on the team purpose/vision and goals, individuals will become more team oriented.

### Stage 3 – Norming

As the group establishes what is expected of its members, conflict will decrease. The team will grow in confidence, mutual trust and respect. They will have learned how best to interact with each other and will regard each other's skills and experience as team assets.

### Stage 4 - Performing

The group has developed into a team, demonstrating team thinking and behavior. They identify with the team and have pride in the team's results. Members may help with incomplete tasks outside their own area of responsibility in order to meet their team goals.

Effective teams demonstrate the following:

- √ **Participation.** Do all team members participate actively? Are roles shared to accomplish tasks and feelings of group togetherness?
- √ **Feedback.** Is feedback given freely and often? Is the feedback constructive in nature?
- √ **Decisions.** Are decisions the result of input from all team members? Do members discuss issues and problems?
- √ **Conflict.** Are team members encouraged to express their feelings freely? Do team members attempt to confront and resolve conflicts between themselves?
- √ **Risk taking.** Are challenges confronted and creativity encouraged? Are mistakes treated as a source of learning?
- √ **Leadership.** Is leadership supportive? Is leadership shared among team members?

## **WORKING AS A TEAM**

This section explains how to work together as a team, meeting when necessary and using other means of communication whenever possible to make best use of the precious commodity of time.

### **Meetings**

An annual planning meeting is essential for all members of the team to have input in discussing possible goals or revising previously established goals, agreeing on goals, creating annual objectives to accomplish goals and committing to achievement of the goals and objectives.

A mid-year evaluation meeting may be beneficial to review results, revise objectives if needed, and assist other team members in achieving results.

### **Shared Goals**

An example of a shared goal is: to achieve membership growth of 5% within 18 months. This goal would be shared by all MERL chairpersons, since the membership and extension chairpersons would focus on adding new members and the retention and leadership development chairpersons would make sure personal member needs are met so that they remain active and satisfied in their membership. Each chairperson would have a function specific objective focused on this goal.

In order to accomplish the goal, each chairperson would need to achieve results for their function specific objective. The timing of one objective focused on training new club leaders would depend on the completion of the objectives related to developing new clubs and recruiting new members. Communication is essential to avoid any delays in accomplishing sequential objectives.

### **Sample Calendar**

#### 1<sup>st</sup> Quarter: July- September

Attend team meeting to review goals and develop action plans for the Lions year including a specific timetable & accountability for results in each action plan

#### 2<sup>nd</sup> Quarter: October -December

Review progress and discuss strategies to stay motivated to achieve goals  
Communicate and applaud achievements

#### 3<sup>rd</sup> Quarter: January - March

Continue to monitor progress and discuss solutions to challenges to achieving goals  
Review membership data summary  
Re-evaluate goals for revision or re-prioritizing  
Prepare report for district or multiple district convention

#### 4<sup>th</sup> Quarter: April - June

Recognize accomplishments of successful individuals at district or multiple district events  
Establish goals for next Lions fiscal year

## **Coaching**

Coaching is a very important function that is necessary for any team to function at a high level. If one member of the team is not completing their tasks on schedule, it will impact the overall team progress to achievement of their goals. Coaching is the process you use to empower individuals to put forth their best efforts to accomplish specific goals. As you work with sub-committees, you may need to use coaching with some Lions.

What is coaching? It is a planned step-by-step process. Your focus is accomplishment of a goal. The person being coached is involved in creating a solution, and as a result is more motivated to improve and succeed.

Effective coaches do the following:

- Provide a safe environment by establishing a relationship with the person being coached in which performance can be mutually examined with openness and trust
- Use strategies and plans that build on the existing strengths of those they coach
- Find a comfortable, quiet place to meet where interruptions will be avoided
- Communicate by listening to each other and share ideas to mutually agree on action or solution
- Follow through to make sure mutually agreed upon goals are achieved

As described in the Lions Learning Center online course, Coaching, a good five step coaching process to use is to:

1. Identify the behavior that is a problem and confirm that it is within the control of the person being coached
2. Describe the implications on people or the environment on preventing an objective from being achieved
3. Reinforce or correct performance by providing an example of the desired performance and discussing this with the person
4. Mutually agree upon a plan of action for improvement with events and a specific schedule
5. Follow up on the specific plan of action that was mutually agreed upon

You can use an action plan worksheet to record your agreed upon plan of action. For more details about coaching, take the online course **Coaching** in the Lions Learning Center on the LCI website.

## **Communication**

On-going communication via email, fax or phone is a primary way of informing other team members of progress toward objectives or asking for assistance in meeting challenges. Collaboration is much easier to coordinate if there is regular communication about your action plans, achievements and any problems you may encounter. Communication can also increase motivation among team members.

## **MERL: Teamwork for Growth**

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Communication between the MERL team and the team coordinator can be used in the following ways:

- To inform of additional or new information about programs or membership results
- To motivate and inspire greater achievement
- To pace and remind team members of upcoming milestone or deadline dates for achieving objectives
- To seek resources or creative solutions to challenges encountered
- To gather information for routine reports to district governor, council chairperson, Global Membership Team, or LCI
- Identify meaningful incentives and recognition awards

Overall, team communication should be positive, constructive, supportive and concise.

### **MERL Team Coordination**

The MERL team coordinator can be one of the team members or another qualified Lion. If you are serving as coordinator, your goal is to provide assistance and motivation in an efficient manner. The coordinator ensures communication among MERL team members by scheduling meetings and maintaining routine communication using phone, fax or email. You will assist the team in developing collective as well as function specific goals, objectives, and action plans. The coordinator may be the liaison between the team and the multiple district council or the district cabinet. You also provide support in the team's implementation of their action plans. It is important to keep up-to date regarding new programs related to membership and leadership development so that you can be a resource for the team members.

Each year an annual planning and evaluation meeting should be conducted. After an assessment of results from the previous year's objectives and action plans, the team can create new short term goals or objectives for the next year. Once the objectives are created; detailed action plans can be developed.

Another possible meeting is at mid-year for the purpose of reviewing progress toward accomplishing your annual objectives and related action plans. This is an opportunity to manage your goals. Sometimes new opportunities arise that allow you to meet your objective using a different means. For example, instead of organizing a New Century club, you may organize a work group based club. Based on more information or a change in the situation, you may decide during the year to change some of your plans in order to meet your objective.

The job description for the MERL Team Coordinator follows.

## **MAJOR RESPONSIBILITIES OF THE MERL TEAM COORDINATOR**

The MERL team coordinator provides support and promotes open communication and collaboration among MERL team members. This position is optional. Any capable Lion or an existing MERL team member may serve as MERL team coordinator.

### **Goal Setting**

1. Assist the MERL team in establishing goals related to their individual functions while developing collective team goals to enhance membership development and growth.
2. Provide support as needed in the development and execution of related action plans.

### **Communication**

1. Ensure communication among MERL team members by scheduling periodic meetings, beginning with the annual planning meeting.
2. Encourage an open exchange of information to achieve team and individual goals.
3. Promote collaboration with area leadership and with Global Membership Team leader.

### **Annual Objectives**

1. Schedule and participate in periodic MERL team meetings, including the annual planning meeting, to measure progress and celebrate success.
2. Assist team with establishment of goals and development of action plans to achieve those goals.
3. Maintain current knowledge regarding MERL resources and developments.
4. Communicate with the MERL team via telephone, fax, e-mail and meetings.
5. Provide support and motivation throughout MERL team's term.

The MERL team coordinator is appointed by the district governor for the district team, and by the council of governors for the multiple district MERL team.

## **RESOURCES**

This section will list resources for all team members and grant funding available, including new resources such as a membership data summary.

### **Publications**

The manuals explaining the position tasks and responsibilities for each function in the MERL team are available online or can be requested from LCI. Copies are sent to the MERL chairpersons following their appointment and receipt of personal contact information at LCI headquarters. Additional publications are available by emailing the appropriate department listed below.

### **Presentation Resources**

- Leadership request from [leadership@lionsclubs.org](mailto:leadership@lionsclubs.org)
- Organizing a New Club request from [newclubs@lionsclubs.org](mailto:newclubs@lionsclubs.org)
- District Support of Clubs request from [leadership@lionsclubs.org](mailto:leadership@lionsclubs.org)
- Healthy Club Toolbox request from [memberops@lionsclubs.org](mailto:memberops@lionsclubs.org)

### **Membership Data Summaries**

This summary report will be emailed to MERL team members quarterly for the purpose of evaluating achievement of objectives. The report includes a multiple district membership data summary and detailed statistics by district.

### **Awards:**

Recognition of dedicated volunteer work is very important to continued motivation of MERL team members and their sub-committees. Achieving results can be challenging and time consuming so it is necessary to applaud accomplishments in order to have continued success. Formal awards are listed in detail in the publication, *Guide to LCI Awards and Recognitions* and on the LCI website. An easy to read booklet, *The Art of Recognition*, explains the importance of both informal and formal awards. This publication is also on the LCI website.

### **LCI departments : Phone: 630-468-XXXX**

Membership: Membership Operations, Ext. 6734, email: [memberops@lionsclubs.org](mailto:memberops@lionsclubs.org)

Extension: New Clubs & Marketing, Ext. 6815, email: [newclubs@lionsclubs.org](mailto:newclubs@lionsclubs.org)

Retention: Membership Operations, Ext. 6734, email: [retention@lionsclubs.org](mailto:retention@lionsclubs.org)

Leadership: Leadership Administration Department, Ext. 6935, email:

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

## CLOSING THOUGHTS

***You have accepted a challenging and rewarding position that greatly impacts the future of Lionism.***



*You may have heard the story of the tiny frogs and the tower. The frogs were challenged to climb the tower, which everyone agreed was a challenging task. One by one they tried and failed, however the last frog to climb the tower kept going higher and higher until he reached the top. Everyone was amazed and asked how was it possible that the last frog had succeeded when all the others had failed. It was revealed that the frog was deaf, and could not hear the comments of the crowd saying that it was impossible to reach the top.*

**If you believe you will fail, you certainly will.**

As you work together as a team and as individuals, it is important to keep a positive attitude and high motivation at all times. Perhaps reading some of these quotes or posting them at your desk or by a phone will be helpful.

***Leaders are visionaries with a poorly developed sense of fear and no concept of the odds against them. They make the impossible happen.*** Dr. Robert Jarvik, inventor of artificial heart

***It matters not if you try and fail and try and fail again. It matters a great deal if you fail to try.***  
Author Unknown

***Nothing is particularly hard if you divide it into small jobs.***  
Henry Ford, American inventor and automobile manufacturer

***Leadership is the capacity to translate vision into reality.*** Warren G. Bennis, business leader

***Never doubt the ability of a small group of committed individuals to change the world. It's the only way it ever happens.*** Margaret Mead, anthropologist

***Achievement is largely the product of steadily raising one's levels of aspiration and expectation.***  
Jack Niklaus, professional golfer

***Don't say you don't have enough time. You have exactly the same number of hours per day that were given to Helen Keller, Pasteur, Michelangelo, Mother Teresa, Leonardo da Vinci, Thomas Jefferson, and Albert Einstein.*** H. Jackson Brown, New York Times author

***High achievement always takes place in a framework of high expectation.*** Jack Kinder

***A handful of pine-seed will cover mountains with the green majesty of forest. I too will set my face to the wind and throw my handful of seed on high.***  
William Sharp, author

