



Lions Clubs International



Club Excellence Process Lite Club Coordinator Guide





Lions Clubs International

Dear Club CEP Coordinator,

Lions Clubs International is pleased that your club will be conducting Club Excellence Process (CEP) Lite. CEP is about your club—how it serves, communicates, grows, maintains members and develops leaders. CEP is one of the fastest growing and most impactful initiatives LCI has undertaken.

As a club CEP coordinator, you are faced with three important responsibilities:

- Preparation
- Implementation
- Follow-up

This guide has been created to support you with each of these tasks. It provides you with an introduction to CEP Lite, an overview of the four workshop steps, and an activity guide for each step. At the conclusion of the workshop, you will need to complete the workshop evaluation form included in your workbook. Once LCI receives your workshop evaluation, a CEP banner patch will be mailed to your club.

It is important to remember that CEP is a *process*. It does not end at the conclusion of the workshop. If your club achieves the goals it will establish in CEP, you'll need to set new ones. If you discover unmet community needs through the *Community Needs Assessment*, you'll want to conduct it again periodically to ensure that you continue to meet its needs. If you think CEP helped increase membership satisfaction, conduct the *How Are Your Ratings?* survey again to see if it actually improved. You can even conduct CEP in your club every year to make sure your club stays on the road to excellence.

We ask that you take time to review this guide in detail before the workshop begins. If you have questions or need assistance, please contact your GMT or GLT coordinator, a member of your DG team, or the Membership and New Club Development Department.

Sincerely,

Membership and New Club Development Department
CEP@lionsclubs.org

CEP LITE Club Coordinator Guide

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THE CLUB EXCELLENCE PROCESS OVERVIEW

Program Overview

The Club Excellence Process (CEP) is a workshop program dedicated to enhancing member experience and better serving the community. A CEP Workshop can be conducted in one of two formats: CEP Lite or CEP Pro. CEP Pro is a facilitator-guided workshop, and CEP Lite is a self-guided workshop in which a club member acts as the coordinator.

In either format, a participating club will examine its community’s needs, analyze its membership experience, identify club and LCI resources, and develop action plans for moving forward. The information contained in this overview applies to both the CEP Pro and CEP Lite format.

The Club Excellence Process is a four-step process that can be delivered in one to four sessions. Each workshop session can be held at a club meeting, retreat or other gathering. CEP participants will complete several activities in a participant workbook that is downloadable from the LCI website or orderable from LCI. As part of CEP, clubs will need to complete the *Community Needs Assessment* and the *How Are Your Ratings?* survey. Participants may be asked by their coordinator or facilitator to complete these assignments before, during, or after a scheduled workshop step.

Here is a quick look at what clubs will accomplish during a CEP Workshop:

<p>Step 1: Why Are We Here?</p> <p>(45-60 minutes)</p>	<ul style="list-style-type: none"> ✓ Recognize what your Lions have accomplished ✓ Discuss what your club could accomplish in the future ✓ Identify unmet needs in the community ✓ Plan to conduct a <i>Community Needs Assessment</i>
<p>Step 2: What Makes an Excellent Club?</p> <p>(75-90 minutes)</p>	<ul style="list-style-type: none"> ✓ Complete the <i>How Are Your Ratings?</i> survey ✓ Determine the characteristics of an excellent club ✓ Identify obstacles to achieving club excellence ✓ Analyze ways to improve club effectiveness
<p>Step 3: How Can We Determine Our Needs?</p> <p>(45-60 minutes)</p>	<ul style="list-style-type: none"> ✓ Review the <i>Community Needs Assessment</i> ✓ Review the <i>How Are Your Ratings?</i> survey results ✓ Identify club and LCI resources for achieving excellence
<p>Step 4: What Can We Do Next?</p> <p>(45-60 minutes)</p>	<ul style="list-style-type: none"> ✓ Set goals for the future ✓ Create action plans to achieve your goals

CEP CLUB COORDINATOR RESPONSIBILITIES

	Tasks
<p>Preparation</p>	<ol style="list-style-type: none"> 1. Review the CEP Lite Participant Workbook prior to the workshop so you are comfortable leading the activities and discussions. 2. Determine if your club members should complete the workbook activities individually, in pairs or as a group (or a combination of formats) before or during the workshop. 3. Complete the CEP Lite Schedule for each step. You may want to do this at a club meeting with your members to ensure they are able to participate and meet deadlines. <p>If you are conducting the workshop in a single day, you will need to have club members complete the Community Needs Assessment and the How Are Your Ratings? survey before the workshop begins.</p> <ol style="list-style-type: none"> 4. Review the Step-by-Step Overview to become more familiar with the workshop tasks and supporting resources.
<p>Implementation</p> <p>(You will find implementation tips and tasks listed in the columns of each step.)</p>	<ol style="list-style-type: none"> 1. <i>Emphasize to club members that CEP is a process. Action plans will be developed in the workshop, and they should be worked on until all goals are achieved. Excellence requires ongoing evaluation of community needs, clubs goals and member satisfaction.</i> 2. Guide your club through each of the four workshop steps. Conduct the activities included in the participant workbooks. Members can complete the activities individually, in pairs, or as a group. <p><i>Tip: In order to keep your members interest high, try not to read the text word for word when presenting to the club. Encourage engaging discussions by asking open-ended questions.</i></p> <ol style="list-style-type: none"> 3. Allow adequate time for members to complete each activity and to discuss questions and answers with other members. 4. Observe discussions between members, and pay attention to body language. Non-verbal cues are an important indicator of attitudes and interest level. As a CEP club coordinator, it is your role try to engage all members in activities and discussions, as well as resolve any differences that may arise. 5. Promote the tools and resources that are mentioned throughout the workshop. Also, remind members that they are not alone in the Club Excellence Process. Members of your district, global membership team, global leadership team, and LCI staff can provide additional resources and support to make this process successful. 6. Ensure that the workshop is completed within in four months or less, which requires conducting at least one step a month. This helps ensure that members retain information from each step.

	Tasks
Post-Workshop Follow-Up	<ol style="list-style-type: none"> 1. Remind members that CEP does not end after the workshop is over. The club's task will be to implement your action plans until all goals are achieved. 2. Send a copy of your club goals and action plans to your GMT and GLT district coordinators. They can provide assistance and additional resources to help your club reaching its goals. 3. Submit the evaluation form to LCI to receive your club's CEP banner patch. The banner patch will be mailed to the club secretary or club officer with an address on file at LCI. 4. Ensure that CEP progress reports are given at every club meeting. 5. Update your GMT and GLT coordinators and DG team on your progress and report any challenges you encounter. 6. Report your successes to LCI by submitting your Membership Success Story on the LCI website under "Membership Communication."

CEP LITE SCHEDULE

STEP	WORKSHOP DATE
Step 1: Why Are We Here?	
Step 2: What Makes an Excellent Club?	
Step 3: How Can We Determine Our Needs?	
Step 4: What Should We Do Next?	

OTHER IMPORTANT DATES

TASK	DUE DATE
Complete <i>Community Needs Assessment</i> (Reviewed in Step 3)	
Complete <i>How Are Your Ratings?</i> survey (Reviewed in Step 3)	
Complete the <i>Coordinator Evaluation of Workshop</i> and send to LCI (Located at back of guide and on LCI website)	
Complete the <i>Final Report and Request for Banner Patch</i> and submit to LCI (Located at back of guide and on LCI website)	
Send copies of goals and action plans to district GMT-GLT coordinators (To be submitted by CEP club coordinator after Step 4)	
Submit your CEP Workshop success story. Go to www.lionsclubs.org and type in “submit membership success stories” in the search box located in the top right-hand corner of the LCI website.	

STEP-BY-STEP WORKSHOP OVERVIEW

Workshop Step	Main Topic Covered	Club Coordinator Tasks
Step 1 (45-60 minutes)	Community Needs Assessment	<ul style="list-style-type: none"> Establish how CEP can benefit the club Introduce participants to the Community Needs Assessment (if not conducted prior to workshop) Identify community needs
Step 2 (75-90 minutes)	How Are Your Ratings?	<ul style="list-style-type: none"> Identify and discuss the characteristics of an excellent club Determine which of these characteristics exist in your club Discuss what prevents your club from achieving excellence Complete the How Are Your Ratings? survey (or assign it to be completed before Step 3) <p>Note: If you plan to complete CEP in one day, you will need participants to complete the Community Needs Assessment and the How Are Your Ratings? survey before the workshop begins. Otherwise, both will need to be completed before Step 3.</p>
Step 3 (45-60 minutes)	Selecting Resources	<ul style="list-style-type: none"> Review the Community Needs Assessment and the How Are Your Ratings? survey results Evaluate community needs and past/current service projects Identify club strengths and areas for improvement Identify resources to help achieve excellence
Step 4 (45-60 minutes)	Identifying Goals and Creating Action Plans	<ul style="list-style-type: none"> Guide participants through developing goals and action plans Reach agreement on action plans Implement action plans as a club after workshop has concluded

Tip: Use a flip chart to give your club a visual reminder of what was discussed in the workshop.

Tape flip chart pages around the room so club members can review what was previously discussed.

Suggested Materials

- Flip chart
- Easel
- Markers
- Pens
- Paper
- Computer/projector
- Microphone

STEP 1 WORKSHEET: WHY ARE WE HERE?

Objectives for STEP 1:

- Establish why our club is here
- Talk about what we can accomplish
- Discuss the needs of our community and how to meet those needs

Activity # 1: Establish why our club is here

1a. Discuss why we are here

The Club Excellence Process is designed to help our club reach its true potential by enhancing our members' experience and better serving our community. There are many reasons why our club has decided to go through the process. Review some common reasons listed below and then add your own to the list.

- To learn and improve as Lions
- To strengthen our community through service
- To have fun
- To provide disaster relief and meet community needs
- _____
- _____
- _____
- _____
- _____

So how can our club create a more satisfied membership and a stronger community? We need to start by asking questions to discover where we are as a club and a community, and what can be done in the future to improve both.

1b. List goals and expectations for CEP Lite

What is one goal or expectation you have for the Club Excellence Process?

Activity # 1a

Main Coordinator Task:

Club members need to understand why the club is participating in this workshop. They also need to understand that they are one of many clubs participating in CEP.

Coordinator Tip: The coordinator should have a positive and supportive tone throughout the workshop, as well as address any individual or group concerns that arise during the workshop.

Activity # 1b

Main Coordinator Task:

Ask participants to list their goals or expectations for the CEP workshop.

Coordinator Tip: Having personal goals makes it easier to progress. This is true for club and non-club matters.

Activities # 2a & 2b

Main Coordinator Task:

Have participants rate the accuracy of the 2a and 2b statements using the disagree/agree table below.

Disagree			Agree		
1	2	3	4	5	6
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Coordinator Tip:

In Activity 2b, members should see a direct relationship between membership satisfaction and the service provided.

Member satisfaction leads to happier, healthier clubs that retain members and invite new members. Both satisfaction and invitation lead to more hands for service.

Activity # 2 Talk about what we can accomplish

Activity 2a: Discuss what our club has accomplished and what can be done in the future

Our community has many needs, and it is counting on us to assist with those unmet needs. It's essential that we look closely at our service projects, and consider the impact of membership on our ability to perform service and meet the community's needs.

Have you noticed:

An increase in service being provided by your club?

An increase in membership growth in your club?

Comments:

Activity 2b: Consider if all of our members were highly satisfied with their Lions experience.

Would more members invite others to join? Yes No Unsure

Would members participate more often in projects and meetings? Yes No Unsure

Would members be more likely to remain Lions? Yes No Unsure

Comments:

Activity 2c: List 3-5 service projects that our club has conducted within the last year:

1. _____
2. _____
3. _____
4. _____
5. _____

Activity 2d: Now consider how our service projects would be different if our club had 10-20% more members join this year:

What additional needs could we meet?

How much more money could the club raise?

How many more people could we help?

What new service projects could be conducted due to the increase in club membership?

Activity # 2c

Main Coordinator Task:

Have participants list service projects conducted within the last year.

Coordinator Tip: Credit the club members for accomplishing these projects.

Activity # 2d

Main Coordinator Task:

Have participants consider what they could do if the club had 10-20% more members join this year.

Coordinator Tip: By considering the possibilities, members envision and plan for the future of their Lions club.

Activity # 3: Discuss the needs of the community

Activity # 3a

Main Coordinator Task:

Have participants identify unmet needs in the community and then ask how they know about these needs.

Coordinator Tip: By asking members to consider unmet needs, you are demonstrating that community needs are great—that there is a need for the Lions club.

Activity 3a: Identifying unmet needs in our community

List 3 unmet needs that you think we have in our community:

Need # 1: _____

Need # 2: _____

Need # 3: _____

How do you know that these needs exist?

(Do you have personal knowledge? Did you read an article?)

Activity # 3b

Main Coordinator Task:

Have participants complete a *Community Needs Assessment* if they have not already.

Coordinator Tip:

Make sure all members know their role and responsibilities for completing the needs assessment and that they know the date the activity should be completed by. Set the due date in the CEP Lite Schedule and follow the steps listed on the following page.

Activity 3b: Completing a Community Needs Assessment

One of the most effective ways to establish a larger presence in the community and provide effective service is to ask those in the community what they need. We can do this by conducting a *Community Needs Assessment*.

The *Community Needs Assessment* will be a valuable resource for our club because:

- It provides a more comprehensive picture of the community by gathering responses from a variety of community leaders.
- It not only asks what the community needs are, but how the respondent thinks those needs can best be met.
- It asks if there are gaps or duplication in services.
- It helps us better assess the services we provide.
- It asks if the community is aware of services offered.
- It requires “buy in” from our club in both planning and analyzing the assessment.

Note: Even if the club has conducted a *Community Needs Assessment* previously, you should use this tool periodically (every 1 to 3 years) to assess the programs and services you provide to the local community.

Steps for conducting the *Community Needs Assessment*:

The *Community Needs Assessment* questionnaire is located in each CEP Participant's Workbook. The questionnaire will be used when you meet with community leader. Detailed steps for implementing the assessment are included on within the *Community Needs Assessment*, but the basic steps are included below:

- **Step 1:** Introduce the *Community Needs Assessment* to the Board for approval.
- **Step 2:** Appoint a committee to contact community leaders in order to conduct the *Community Needs Assessment*.
- **Step 3:** Develop a questionnaire and cover letter.
- **Step 4:** Decide who to contact in the community.
- **Step 5:** Survey the community contacts you identified.
- **Step 6:** Analyze the survey results (in Step 3).
- **Step 7:** Share the results with your club (in Step 3).
- **Step 8:** Follow up with the survey participants.

STEP 2 WORKSHEET: WHAT MAKES AN EXCELLENT CLUB?

Objectives for STEP 2:

- Complete the *How Are Your Ratings?* survey
- Determine the characteristics of an excellent club
- Identify the obstacles that prevent us from achieving excellence
- Discuss how to improve our club effectiveness

Main Coordinator Task # 1a:

Participants should complete *How Are Your Ratings?* survey. This survey is a great way to listen and learn about members experiences and answers can be given anonymously.

Coordinator tip:

Discuss how members will complete the *How Are Your Ratings?* survey if they have not already. Will members complete the survey online or in paper format? If paper, who will receive and summarize the results?

Each member should give their completed survey to the coordinator for the tabulation of results. Refer to the *Administrative Guide* (ME-15) for help tabulating/summarizing results. Analysis or tabulation of results is important. It will help the club address areas that members identify.

Activity # 1: How can the *How Are Your Ratings?* survey help our club?

Activity 1a: Listen to your members and complete the *How Are Your Ratings?* survey

Listening to our members with the *How Are Your Ratings?* survey can provide the club with new ideas and identify areas for improvement. Each member will have an opportunity to share observations and opinions when we complete the *How Are Your Ratings?* survey. This survey will help us better assess our club by highlighting our strengths and helping us determine what we need to improve in our club.

TO DO LIST:

- ✓ COMPLETE the *How Are Your Ratings?* survey
You will review the results as a club during Step 3 of the CEP Lite process.

Activity # 2: Discuss the characteristics of an excellent club

Activity 2a: What makes a club excellent?

Every Lion wants our club to be as strong and healthy as it can be. We want to make a difference through service. We want to be known in the community for the good work we do. In short, we want to be a part of an “excellent” club.

To achieve excellence, we must first define it.

List five characteristics that you think define an excellent club:

Activity 2b: How can excellence be defined?

Write down LCI’s Excellent Club Characteristics that will be provided by the club CEP coordinator. Then use the following scale to indicate whether or not you think our club possesses these characteristics.

1. _____

2. _____

3. _____

4. _____

5. _____

Main Coordinator Task # 2a:

Ask participants to write down their personal ideas about club excellence

Contrast these personal ideas with the excellence. Characteristics provided by LCI in **Activity 2 b.**

- Characteristics of Excellence**
1. Service-minded
 2. Good Communication
 3. Strong Membership Plan
 4. Retention of Members
 5. Effective Leadership and Club Operations

	Disagree				Agree	
	1	2	3	4	5	6
1.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Main Coordinator Task # 2c:

Ask participants to write down what they think each of the characteristics means.

Activity 2c: Let's examine each of these characteristics of excellence:

What do you think it means to be service-minded?

Why is it important to be service-minded?

How would you define "good communication"?

Why is it important for our club to have good communication?

What do you think it means to have a strong membership-growth program?

Why do you think it's important to retain current members?

What are some ways we can retain members?

What does it mean to have effective leadership development and club operations?

Activity # 3: Identifying our strengths and the obstacles to excellence

Main Coordinator Task # 3a:

Participants should determine how their club currently meets the excellence characteristics.

Coordinator Tip: Be sure to highlight the club strengths and congratulate members for achieving them.

Activity 3a: What are our club's strengths?

Our club has much to be proud of. As a group, let's consider which of the characteristics of excellence we best exemplify and provide examples.

Which characteristics of excellence does our club have?	Provide an example of the characteristic in our club.
Providing good service	
Having good communication	
Establishing a strong membership program	
Keeping members	
Having effective leadership development and club operations	

Activity 3b: What obstacles prevent our club from achieving excellence?

All clubs face obstacles on the way to excellence. The key is to identify those challenges in order to find ways to overcome them. As a group, let's make a list of the obstacles that prevent our club from achieving excellence.

Main Coordinator Task # 3b:

Participants should determine if there are obstacles preventing them from excellence.

Coordinator Tip: Stress that each club member can help the club remove the obstacles and then turn those obstacles into strengths.

What prevents us from achieving each characteristic?	Describe the obstacle to our club.
Providing good service	
Having good communication	
Establishing a strong membership program	
Keeping members	
Having effective leadership development and club operations	

Activity # 4: Improve club effectiveness

Main Coordinator Task # 4a:

Participants should briefly note how they can achieve the excellence characteristics.

Coordinator Tip: Participants should complete Activity 3 and feel that they can accomplish and strive for excellence. Positive changes can be made for club and member benefit.

Activity 4a: How can my club improve its effectiveness?

Now that we've identified some obstacles to excellence, let's consider ways to overcome them as a club:

Ways to improve service projects:

Ways to improve communication:

Ways to improve membership growth program:

Ways to improve member retention:

Ways to improve leadership development and club operations:

STEP 3 WORKSHEET: HOW CAN WE DETERMINE OUR NEEDS?

Objectives for STEP 3:

- Review the *Community Needs Assessment* results
- Review the *How Are Your Ratings?* survey results
- Learn about available resources to achieve excellence

Activity # 1: Review tasks completed in Steps 1 & 2

Activity 1a: Characteristics of excellence review

Before we begin, let's review the five characteristics of excellence identified in Step 3:

- Service-minded
- Good communications
- Strong membership program
- Retention of members
- Effective leadership development and club operations

Activity 1b: Review the *Community Needs Assessment* results

After reviewing the results as a group, answer the questions below:

What high priority needs were identified in the *Community Needs Assessment*.

Main Coordinator Task # 1a:

Review the characteristics of excellence.

Purpose of review: A review helps participants leave the workshop with a clear idea of excellence and how they can achieve it.

Main Coordinator Task # 1b:

Review the *Community Needs Assessment* results. You may ask a club member to record the needs on an easel or computer projector so all members can see.

Purpose of review: Lions will be able to better meet community needs because of the ideas presented in the *Community Needs Assessment*.

Are there any unmet needs that our club has the capability and interest to address?

Were any of our club's projects characterized as successful? If so, what does this indicate?

What can our club change about the projects we are currently involved in to better meet the needs of the community?

Coordinator Tip: Your club should prioritize needs. Tasks that can be worked on immediately and will garner results quickly should be addressed first.

What high priority needs can our club begin working on immediately?

1. _____
2. _____
3. _____
4. _____
5. _____

Activity 1c: Review the *How Are Your Ratings?* results

After reviewing the results as a group, answer the questions below:

What are 3 things we learned about our club from this survey?

- 1. _____
- 2. _____
- 3. _____

What did members identify as the strengths of our club?

- _____
- _____
- _____
- _____
- _____

What areas of improvement did the survey reveal?

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

What actions could our club take to address the areas that need improvement?

Main Coordinator Task # 1c:

Review the *How Are Your Ratings?* results.

Purpose of review: Lions will be able to better meet member needs by reviewing the needs identified in the *How Are Your Ratings?* survey.

Activity # 2: Learn about resources your club can use to improve effectiveness

Main Coordinator Task # 2a:

Discuss resources your club can use to address member needs.

Activity 2a: Review the *Club Excellence Process Resource List*

This list is located in the Participant Resources section in the back of this workbook.

This list provides a comprehensive overview of LCI resources available to assist your club. On the *Resource List*, select resources you might use by putting a check in the “Selection” box.

Write down all resources you selected from the *Resource List*:

- _____
- _____
- _____
- _____
- _____

In addition to LCI resources, you should also consider what additional club or district resources are available. These local resources may include:

- Club or district publications for Lions or non-Lions
- Lion leadership, such as your district GMT and GLT coordinators

Write down any club or district resources that could help our club:

- _____
- _____
- _____
- _____
- _____
- _____

How does it help our club to know what resources are available?

TO DO LIST:

- ✓ **INVESTIGATE** available resources (people or materials)
Consider how they can help address issues revealed in the *Community Needs Assessment* and *How Are Your Ratings?* survey.

- ✓ **REVIEW** available resources
Determine how our club can best use these resources.

Tip: Contact the district governor team or GMT-GLT coordinators for assistance on locating and implementing resources.



CLUB EXCELLENCE PROCESS RESOURCE LIST

The following resource list will be useful to clubs participating in the Club Excellence Process. Each section contains a number of resources, descriptions, and tips for finding the resources online at the LCI website, www.lionsclubs.org.

These resources can help you address deficiencies identified through the *How Are Your Ratings?* survey. They will also provide you with valuable tools that can help you accomplish the club goals and implement the action plans you create as part of CEP.

Keep in mind that these valuable resources can assist you and your club well beyond the Club Excellence Process. Revisit the list periodically for new ideas or when your club needs assistance.

HELPFUL HINTS

Here are some best practices to ensure your club is functioning at the highest level:

1. **Work with your club's chairpersons.** Each club should have one chairperson appointed for service-related activities; one chairperson for membership growth/retention; one or two chairpersons for communications (a public relations chair for communication to the non-Lion community and a newsletter editor to communicate with club members); and a club secretary to oversee drops, adds and other reporting duties related to the club.
2. **Review and adopt even more membership development ideas.** Access the publication *30 Marketing Ideas* by typing "MK-97" into the search box located at the top right hand corner of the Lions Clubs International website (www.lionsclubs.org). Read about attracting prospective members through direct marketing, personal contact, and marketing research. Learn about creating a membership invitation strategy.
3. **Create a Club Binder for your club.** A binder can be very useful for your club. Members in need of materials can look them up or copy them from the binder rather than going online. To create a club binder:
 - a. Gather all club-specific material (newsletters, meeting minutes, officer contact information, etc.).
 - b. Combine club-specific materials with LCI resources. For example, award information, such as the Membership Key Awards flyer (ME-36), or program components, such as the *Family Membership Certification Form*.
 - c. Put all materials into clear plastic binder sleeves and create your binder

SERVICE PROJECT MATERIALS

Selection (✓)	Resource	Descriptions	Find resource online <i>(type keywords into the Search box of the LCI website)</i>
	Community Needs Assessment (MK-9)	Survey to assess community needs, solutions, and current club service. Conduct every 1 to 3 years.	Keyword = MK9
	Lions Learning Center Course -“Providing Community Service”	Resources to help with project prioritization. Guide for creating a project outline, plan, and promotional tactics.	Keyword = Lions Learning Center → Select “Providing Community Service” course.
	Adopted Service Programs of Lions Clubs International (IAD 223)	Covers 7 categories of LCI-adopted service programs: <ul style="list-style-type: none"> • Community service • Diabetes awareness • Environmental services • Hearing and Speech Action & Work with the Deaf • International relations • Opportunities for youth • Sight conservation & work with the blind 	Keyword = IAD-223
	Making It Happen: Guide to Club Project Development (TK-10)	Step-by-step instructions to implement and promote service.	Keyword = TK-10

COMMUNICATION MATERIALS

Selection (✓)	Resource	Description	Find resource online (type keywords into the Search box at www.lionsclubs.org)
	Lions Learning Center Course: “Public Relations”	Create an ‘elevator speech’ to talk to non-Lions about your club. Learn how attract the media to cover your events or members.	Keyword = Lions Learning Center → Select the “Public Relations” course.
	Public Relations Press Release Templates	Select club event and corresponding press release template to submit to media.	Keyword = Sample News Releases
	Television and Radio Public Service Announcements (PSA)	View video PSAs and share links with local media.	Keyword = PSA
	Print Ads	Downloadable newspaper ads for local media.	Keyword = Ads
	E-clubhouse	A free website template that your club uses to build its own website	Keyword = e-clubhouse

CLUB DEVELOPMENT MATERIAL

Selection (✓)	Resource	Description	Find resource online (type keywords into the Search box at www.lionsclubs.org)
	How Are Your Ratings Program	<ul style="list-style-type: none"> • <i>Club Questionnaire</i> (ME-15b) helps members rate their club on meetings, membership, and service. • <i>Administrative Guide</i> (ME-15) helps clubs evaluate their members' responses. 	Keyword = ME-15 & ME-15B
	Lions Induction Program (ME-22)	Induction materials for new members.	Keyword = ME-22
	Lions Orientation Program	Guide for welcoming, orientating and involving all new members of your club.	Keyword = member orientation
	Lions Mentoring Program	Guide for pairing experienced Lions with new members.	Keyword = mentoring program
	Officer Installation program	Ceremony for inducting new officers.	Keyword = LE-1
	MyLCI Web page	Officer training on: <ul style="list-style-type: none"> • Adding, dropping, transferring and reinstating a member. • Reviewing billing, updating club contact info and adding family members to Family Membership Program. • Printing various membership reports useful for your club. 	1) Click "Submit Reports" on the LCI website (located in top right-hand corner of each site page). 2) Click "Lion Officers Login Here." 3) Log in or create a login and password to complete the activities listed to your left.
	Club Officer's Manual (LA-15)	Review club officer, board of director, and committee responsibilities.	Keyword = LA-15
	Lions Learning Center	Provides presentations to help new and experienced club officers develop skills for success, from <i>Valuing Member Diversity</i> to <i>Leadership to Goal Setting</i> .	Keyword = Lions Learning Center
	Membership Satisfaction Guide (new for April 2013)	Guide for recruiting new members and keeping current members happy with the club experience.	Keyword = ME-301

LEADERSHIP DEVELOPMENT AND EFFECTIVE CLUB OPERATIONS MATERIALS

Selection (✓)	Resource	Description	Find resource online <i>(type keywords into the Search box at www.lionsclubs.org)</i>
	Constitutional Area Forums	Attend leadership presentations and seminars.	Keyword = Lions Clubs International Forums
	Lions Learning Center	From <i>Valuing Member Diversity to Leadership to Goal Setting</i> , the Lions Learning Center provides several presentations to help new and experienced club officers develop the skills vital to being successful within their clubs.	Keyword = Lions Learning Center
	Presentations	Slide presentations for goal-setting, nurturing new clubs, service programs, effective club membership teams, and more.	Keyword = presentations
	Lions Leadership Institutes	Learn about the variety of structured learning opportunities through leadership institutes.	1) Click “Member Center” tab on LCI website homepage 2) Click “Develop Leadership Skills.” 3) Select “Development Programs.”
	Officer Installation program	Induct officers soon after their appointment.	Keyword = LE-1
	MyLCI Web page	(See description for MyLCI in Club Development Materials section of Resource List.)	(See MyLCI in Club Development Materials section of Resource List.)
	Club Officer’s Manual (LA-15)	Review club officer, board of director, and committee responsibilities.	Keyword = LA-15
	Lions Learning Center	Provides presentations to help new and experienced club officers develop skills for success, from <i>Valuing Member Diversity to Leadership to Goal Setting</i> .	1) Click “Member Center” tab on the LCI website homepage. 2) Choose “Leadership Development.” 3) Click “Lions Learning Center.”

STEP 4 WORKSHEET: WHAT SHOULD WE DO NEXT?

Objectives for STEP 4:

- Set goals
- Create action plans
- Apply what you have learned

Activity # 1: Setting goals for our club

Activity 1a: Review goal setting

Setting goals is the first step in creating an action plan. Goals should be related to the five characteristics of excellence and based on our *Community Needs Assessment*, the *How Are Your Ratings?* survey results, and resources identified in Step 3 of the workshop.

Ideally, each goal should be SMART. A SMART goal includes the following elements:

- S** - specific
- M** - measureable
- A** - actionable
- R** - realistic
- T** - time-bound

By establishing SMART goals, we will ensure that our club goals are clear, concrete and achievable. Here are some sample SMART goals related to the five characteristics of excellence to help guide the development of our own goals:

- **Service** – Complete a new youth service project in June.
- **Communication** – Create and distribute press releases for three club events by May 1.
- **Member Satisfaction** – By the end of the year, reach out to former club members from the last five years to determine why they left the club.
- **Membership Growth Program** – Recruit five new members by April 15.
- **Leadership Development and Club Operations** – Have an agenda at every meeting this year and train new club officers before they take office.

Main Coordinator Task # 1a:

Review goal setting and the sample SMART goals below with participants.

Coordinator Tip: Goals that are specific, measureable, actionable, realistic and time-bound are more likely to be accomplished than goals not written that way.

Coordinator Tip: The goals to the left are sample SMART goals. Your club may wish to use these, modify these, or create different goals based on what was learned by going through the CEP workshop.

Main Coordinator Task # 1b:

Have participants create goals that address the areas of improvement found in Steps 1 & 2.

Activity 1b: Creating goals for each area of improvement identified in the *Community Needs Assessment* and the *How Are Your Ratings?* survey.

Create a goal statement for each area of improvement we identified in our *Community Needs Assessment* and the *How Are Your Ratings?* survey.

Coordinator Tip: Together, club members should prioritize the goals they set.

Which goals can be completed first?
Which are most likely to lead to success the fastest?

If members can see a goal accomplished quickly, it will be easier for them to progress and accomplish other goals.

Area of Improvement (from Step 3)	Goal Statement

Now that we have a working list of goals, we will need to consider how we want to prioritize the list. Which are the most important? Which are the most immediate? Which goals are the most easily achievable? By creating an action plan, we'll have a better idea of what it takes to achieve each goal.

Activity # 2: Create an action plan for each of our club goals

Activity 2a: Creating action plans for each goal identified in Activity 1b.

Creating an action plan will help us identify who will do what, when they will do it, and how. Once an action plan has been developed, we will have clear steps for reaching our goals, as well as an effective tool for tracking our progress and identifying when our goals have been achieved.

To help our club achieve its goals, we will now create an action plan for each goal developed in Activity 1. An example has been provided in the planning form below.

Main Coordinator Task # 2a:
 Have members review the action plan template below and create action plans based on the goals they set in **Activity 1b.**

CEP ACTION PLAN

What?	Who?	Resources?	When?	Results?
<i>Recruit 5 new members</i>	<i>All Lions</i>	<i>Brochures & posters to hand out</i>	<i>April 15</i>	<i>Have 5 people turn in applications</i>

Activity # 3: Completing the agreed-upon action plans

Main Coordinator Task # 3a:

Have members decide as a club which goals and action plans they can complete.

Coordinator Tip: Goals and action plans can be modified throughout the year. Members should keep track of their accomplished goals. They can also ask their GMT/GLT coordinators, DG teams, other Lions and LCI for assistance in implementing goals.

Activity 3a: Decide as a club which goals and corresponding action plans we can complete.

This is the final step in the Club Excellence Process. It's time to apply what we have learned and complete our agreed-upon goals and action plans. To do this we must first:

- Decide as a club which goals and corresponding action plans we can complete. If we are unable to agree on all goals and action plans during this workshop, we may need to address them at our next club meeting.
- Prioritize our action plans to give clear direction to our club.

If we achieve our goals, our community will be stronger, our members more satisfied, and our club will be closer to achieving excellence.

Remember – this workshop is just the start of the process. It is our responsibility to ensure that the process continues by achieving the goals that were set and striving each and every day for excellence.

TO DO LIST:

- ✓ COMPLETE the CEP participant survey and return it to your workshop coordinator.
- ✓ IMPLEMENT our action plans to achieve club goals.
- ✓ PROVIDE goals and action plans to our CEP club coordinator and district GMT-GLT coordinators. Ask for assistance when we need it.
- ✓ USE club, district and LCI resources to accomplish our goals.
- ✓ MODIFY our goals if necessary.
- ✓ REFER often to the *Community Needs Assessment and How Are Your Ratings?* survey results.
- ✓ CONDUCT the *How Are Your Ratings?* survey again in six months to re-evaluate member satisfaction.
- ✓ CONDUCT the *Community Needs Assessment* periodically (every one to three years) to discover if the needs of the community have changed.

CLUB EXCELLENCE PROCESS LITE

Coordinator Evaluation of Workshop

Please complete the following evaluation concerning your CEP experience. Your honest assessment of the process will help ensure that other coordinators are provided with the information they need to make CEP an effective and rewarding experience for their club.

CEP coordinator name: _____

District: _____

Participating club: _____

Date(s) of workshop: _____

WORKSHOP PREPARATION/THE COORDINATOR ROLE

Statement	Strongly Disagree	----->				Strongly Agree
I received information well in advance of the workshop dates.	1	2	3	4	5	6
I understood the purpose of the workshop.	1	2	3	4	5	6
I understood my responsibilities as a coordinator.	1	2	3	4	5	6
The <i>CEP Lite Coordinator Guide</i> was clear and easy to follow.	1	2	3	4	5	6
I feel that I was adequately prepared to conduct the workshop.	1	2	3	4	5	6

STEPS 1 - 4

Statement	Strongly Disagree	----->				Strongly Agree
The steps were useful for participants.	1	2	3	4	5	6
The steps were easily understood and materials were user-friendly.	1	2	3	4	5	6

POST-WORKSHOP

Statement	Strongly Disagree -----> Strongly Agree
The club has a clear understanding of what it needs to do to achieve excellence.	1 2 3 4 5 6
The club has (or will be able to create) achievable goals for improvement.	1 2 3 4 5 6
The club has (or will be able to create) action plans to guide us toward goal achievement.	1 2 3 4 5 6
The club now recognizes the resources it can use to meet its goals.	1 2 3 4 5 6
I believe the club will follow the plans created and utilize the resources available to meet our goals.	1 2 3 4 5 6

Additional Comments

Can LCI use your comments for the promotion of CEP? Yes No

Send completed report to:

Lions Clubs International
 Membership Development Department
 300 W 22nd Street
 Oak Brook, IL 60523
 CEP@lionsclubs.org

CLUB EXCELLENCE PROCESS

Final Report and Banner Patch Request Form

Complete the form below to notify LCI that you have completed the Club Excellence Process and to request your CEP Banner patch for your club.

District: _____ Club name: _____ Club number: _____

CEP start date: _____ CEP end date: _____

Top three goals identified:

1. _____
2. _____
3. _____

Action plans for goals:

1. _____
2. _____
3. _____

Submitted by:

Name: _____

Title: _____

Send completed report to:

Lions Clubs International
Membership Development Department
300 W 22nd Street
Oak Brook, IL 60523
CEP@lionsclubs.org



Lions Clubs International

Membership and New Club Development
300 W 22nd St
Oak Brook IL 60523-8842 USA
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Phone: 630-203-3845