

Zone Chairperson Training

Workshop Pre-Assignment:

*Preparing for Your Term as
Zone Chairperson*



INTRODUCTION

Congratulations on your Zone Chairperson appointment!

As you begin to prepare for your role as Zone Chairperson, there are many resources available to guide you. A few that are mentioned in this pre-assignment are the Zone and Region Chairperson web page, the Zone and Region Chairperson eBook and the Zone Chairperson Workshop.

Zone and Region Chairpersons Web Page

The Zone and Region Chairpersons web page is a part of the Lions Club International website and can be accessed using the search term “Zone and Region Chairperson”. It includes helpful links to the Zone and Region Chairperson eBook, the Zone Chairperson Learning Map, Model District Governor’s Advisory Meetings guide and more. Be sure to visit this web page to see all the resources that are available to you.

Zone and Region Chairpersons eBook

The Zone and Region Chairperson eBook (found on the Zone and Region Chairpersons web page) is a useful guide that provides quick access to resources, policies and tools that will help you have a successful term. You can find the eBook by searching our website using the search term “Zone and Region Chairperson eBook”.

Both the Zone and Region Chairperson web page and the Zone and Region Chairperson eBook will be reviewed in the Role and Responsibilities of the Zone Chairperson session of the Zone Chairperson Workshop, but it is good to start using them before you attend the workshop.

Zone Chairperson Workshop

The Zone Chairperson Workshop is designed to help you quickly and efficiently meet the responsibilities, demands and expectations of the zone chairperson role.

There are two parts to the Zone Chairperson Workshop. The first part is **this Zone Chairperson Workshop Pre-assignment**, which is used to prepare incoming zone chairpersons for the Zone Chairperson Workshop. The second part is the actual **Zone Chairperson Workshop**.

Part 1: Zone Chairperson Workshop Pre-Assignment

This Zone Chairperson Workshop Pre-assignment is designed to increase awareness of your zone's issues and challenges and help you determine its current state. Current state is a term used to describe processes as they currently function. Having this knowledge will help you plan for your term.

There are two parts to the pre-assignment. The first part consists of online training that will supplement your knowledge for the Zone Chairperson Workshop. The second part is a zone assessment. The zone assessment has four steps that you complete to help you determine the current state of your zone. The appendix contains a checklist (page 17 - 18) you can use to keep track of all the pre-assignment steps that you complete.

- **Online Learning**

The online learning courses listed below will help reinforce the communication and goal planning skills you will use in the Zone Chairperson Workshop.

- Conflict Resolution
- Goal Setting

- **Zone Assessment**

To determine the current state of your zone, you will be asked to create a zone assessment. The zone assessment consists of the following:

- Review Communication Basics
- Interview Contacts Using Guiding Questions
- Analyze Guiding Question Responses
- Complete the Strengths, Weaknesses, Opportunities and Threats (SWOT) Worksheet

Part 2: Zone Chairperson Workshop

The Zone Chairperson Workshop is the instructor-led portion of this training. It includes a deeper exploration of the zone chairperson role and responsibilities, and information on how you can support the clubs in your zone.

Workshop Pre-Assignment: Preparing for Your Term as Zone Chairperson

The Zone Chairperson Workshop includes the following sessions:

- Role and Responsibilities of the Zone Chairperson
- Assessing Club Health
- Problem-Solving
- Zone Goal Setting and Action Planning

Instructors may also include additional topics to the Zone Chairperson Workshop at their discretion.

Please note: You will use the results of your zone assessment in the Zone Chairperson Workshop. Please be sure to complete each step of the assessment process and bring this pre-assignment guide to the workshop.

ONLINE LEARNING

Online Resources

The first part of your pre-assignment is to take the **Conflict Resolution** and **Goal Setting** online courses which can be found in the Lions Learning Center. You will need a Lions Account to access the Lions Learning Center. If you have additional questions, please email elarning@lionsclubs.org.

Online Courses

Conflict Resolution

As you think about problem solving in your zone, you can break problems down into either people or process issues. The Zone Chairperson Workshop includes a session called Problem-Solving, which will focus on process issues. The Conflict Resolution online course should be viewed as complimentary to the Problem-Solving session as it focuses on conflict issues between people and why they happen.

Goal Setting

The Goal Setting online course will focus on goal setting and action planning basics, so that you will be ready to complete goal setting and action planning exercises in the Zone Goal Setting and Action Planning session.

ZONE ASSESSMENT

The purpose of the zone assessment is to determine the current state of your zone. By following the steps below, you will get a lot of information about how your zone currently functions.

There are four steps to completing the zone assessment:

Step 1: Review Communication Basics

The communication basics review explores communication methods and tips for you to use as you begin to contact your zone's first vice district governor/district governor-elect, current zone chairperson and incoming club presidents.

Step 2: Interview Contacts Using Guiding Questions

The guiding questions are a prepared list of questions you will use to begin to gather information regarding your zone. If you think of additional guiding questions that would be good to ask that aren't on the guiding questions list, you can also include those questions when interviewing your contacts.

Step 3: Analyze Guiding Question Responses

Once you have gathered responses to your guiding questions, use the Guiding Question Response Analysis worksheet to answer a series of questions. As you begin to answer these questions, think of how they apply not just to your clubs, but how they apply overall to your zone. Your answers will help you to determine your zone's current state so that you can begin thinking and planning for your zone in strategic ways during your term.

Step 4: Complete the SWOT Worksheet

After completing the Guiding Question Response Analysis worksheet, use the SWOT worksheet to help you map and notice common themes with the clubs in your zone. The SWOT worksheet is broken into four quadrants so that you can categorize any strengths, weaknesses, opportunities and threats that you find in your zone. By using this information and applying that knowledge to your zone, you will be able to quickly determine your zone's current state.

STEP 1: REVIEW COMMUNICATION BASICS

Preparing to Communicate as a Zone Chairperson

Effective communication is central to the zone chairperson role. As the link between the clubs and the district you will facilitate two-way communication between them.

As a key **resource for the clubs and club officers**, you will communicate information from the clubs in your zone to the district regarding their successes and challenges. Zone chairpersons also direct the flow of communication amongst the various levels of the district and ensure that the lines of communication remain open.

Zone Chairperson

Clubs



District

Examples of how zone chairpersons facilitate communication within clubs:

One of your top priorities is to reinforce club level communications, to support initiatives and provide resources. You ensure club officers are updated with the latest information and resources available through Lions Clubs International in addition to serving as a critical part of the feedback loop between clubs, districts and Lions Clubs International headquarters.

- Share information about programs and projects organized by the district, the multiple district and Lions Clubs International.
- Share information provided by Global Action Team leaders.
- Participate in the district, multiple district and international conventions to share with club leaders.
- Provide opportunities for club leaders to share and interact at zone meetings, to give them learning opportunities for club leadership and celebrations of club successes.
- Work with clubs to ensure the club is in active status and dues are paid.
- Be available as a resource to help problem solve issues that clubs may be facing.
- Share information from the clubs back up to the district and multiple district as an active part of the feedback loop.

Examples of how zone chairpersons facilitate communication with district governors:

- Communicate the needs of the clubs to district leaders.
- Identify and encourage potential leaders to consider district leadership positions.
- Share ideas gained from clubs within the zone with other zone chairpersons and district leaders so they can share best practices with clubs throughout the district.
- Serve as an advocate of the clubs and communicate club challenges and dissatisfaction to district leaders to allow the leadership to strategize to develop an improved plan to support clubs.

Communicating with Your Contacts

To get the information you need to determine your zone's current state, you will interview your contacts using guiding questions provided in step two.

Specifically, you will need to contact:

- Your zone's current/incoming club presidents
- Your current zone chairperson
- Your zone's first vice district governor/district governor-elect

Although you may not be able to contact everyone you would like to talk to, make every effort to communicate with as many contacts as possible. By doing so, you will be able to get the best understanding of your zone.

Effective Communication Tips

As you gather information, you will interact with many different people, encounter different personalities, and use a variety of communication styles. Use the tips below to get the best results when you interview your contacts.

- **Establish your own expectations.** Be sure to realistically define what you expect to gain from each of your conversations. This will help you guide conversations with your contacts so you can gather the information you need the most.
- **Keep an open mind.** As an incoming zone chairperson, it is assumed that you already have a lot of knowledge about your zone. But as you gather information, the guiding questions can help you confirm or challenge what you know about your zone. Be open to the possibility that you will learn things about your zone that you didn't know before.
- **Build rapport with your contacts.** Let your contact know you value the information they are sharing with you and how that information will help you as a zone chairperson.
- **Explain your purpose.** Clarify with your contacts that the information gathered from your discussion will allow you to find solutions to existing challenges and to explore existing opportunities.
- **Be supportive.** While most people are willing to talk about their achievements, your contacts might be uncomfortable discussing difficult situations or challenges they are facing or have experienced. Be sure to listen carefully and offer your support when appropriate.
- **Practice active listening skills.**
 - As you listen, be aware of not only what is being said but how it is being said.
 - Use the paraphrasing technique of repeating back to the speaker what they have just said in order to clarify key points.
 - Focus on the experience of the speaker instead of your own personal experiences.
 - Defer judgment and refrain from interrupting the speaker even if you disagree with what is being said.
 - At the end of a long conversation, **summarize** important information to verify your understanding.
- **Record information for future analysis.** If you are unable to take notes during a discussion, be sure to record key points of the conversation as soon as possible so that important information is not lost. The Guiding Questions Worksheet (see pages 19-20 in the Appendix) is ideal for recording information received from your contacts.
- **Determine communication preferences.** If you have contacts you will be speaking to on multiple occasions, it's helpful to determine their communication preferences. Your contacts may span different generations and might have differing technical abilities. Some of your contacts might prefer phone calls and emails, while others may prefer texts or being reached on social media. Knowing this can reduce response times from them and make it easier to communicate.

When in doubt about your contacts' communication preferences, ask them how they prefer to be contacted.

Communication Methods

As you begin to prepare for your term as zone chairperson, it's helpful to think about the methods of communication that are available to you and strategize about how to use them. Communication methods can be broken into two categories:

- Traditional Communication Methods
- Web-based Communication Methods

Districts and clubs both use traditional and web-based methods of communication. Below are examples of each.

Traditional Communication Methods:

Telephone and Conference Calls	A telephone call provides the opportunity to interview your contacts without interruption. Conference calls are an easy and efficient way to communicate with groups.
Email	Email can be an excellent way to disseminate information, send reminders of important dates or events, or to follow-up with an individual or group. Emails also provide a record of communication taking place.
Mail	Regular postal mail is an option for those who do not use email to communicate or when something cannot be sent as an email attachment. Be aware of the time and cost involved when sending postal mail and plan accordingly.
Cabinet Meetings	This is the best way to learn about district-wide initiatives, programs, and goals. Information learned at these meetings should be conveyed to club leadership.
Zone Meetings	Zone meetings are an excellent forum for dialogue between the zone chairperson and the clubs and amongst the clubs themselves. These meetings facilitate information, idea sharing and the opportunity for collaborative problem-solving.
Club Visits	Club visits are an excellent opportunity to observe clubs in action, talk to officers and members, promote Lions Clubs International programs, district goals, and offer your support if needed. You are required to visit each club in the zone at least once during your term as zone chairperson.
Zone Newsletter	A zone newsletter provides an opportunity to highlight club news, share important information and recognize club achievements. Zone newsletters can also be sent to the district governor as a way of informing him/her about what is happening at the zone level.
District Newsletter	Submit zone news to the district newsletter or guide the clubs in your zone on how to submit club news to the district's newsletter.
Submitting Reports	Submitting club visit and zone meeting reports are simple but important ways of making the district governor and other key district leaders aware of any issues that might require further attention.

Web-based Methods:

Club Websites/ e-Clubhouse	Many clubs have their own websites or e-Clubhouse for those interested in learning more about a specific club.
Social Media	‘Social media’ refers to any web-based or mobile technologies that turn communication into an interactive dialogue. Facebook, Instagram and Twitter are examples of popular social media sites that facilitate the sharing of information, ideas, news, and media (photos, videos, links, etc.).
Messenger Applications	Messenger groups can be useful to communicate with small groups, such as club presidents in your district, to send shorter communications and quickly get feedback from your group. Some examples of messenger applications are Facebook Messenger, WhatsApp and WeChat just to name a few.
Blog	A blog can serve several functions but is most often used as an online journal to share information, ideas, and media (photos, videos, links, etc.). Blogs can also be used as a ‘virtual’ zone newsletter that can be updated with zone news, important information, a calendar of events, etc.
Webinars, Facebook Watch Parties	Webinars are virtual meetings or trainings that are conducted online with a group of participants. Attendees use the internet to connect with each other and meeting facilitators to engage in a live event without leaving their homes or workplaces.

As you think about using these communication methods, the most important consideration is your target audience. Ask yourself the following questions:

- Who will be receiving this message?
- How skilled is my contact with technical communication?
- Is my contact more comfortable communicating in traditional ways?
- Does my contact have mixed preferences, and do I need to consider using multiple methods of communication?

When you consider your contact’s communication preferences, then it becomes easier to strategically select the communication methods that will work best for you.

STEP 2: INTERVIEW CONTACTS USING GUIDING QUESTIONS

Step 2 involves interviewing your contacts using the guiding questions provided below. These questions will help you quickly gain the knowledge you need to better understand your zone's current state. You can ask additional questions that aren't included on the list if you think it would be helpful.

Use the **Zone Assessment Guiding Questions Worksheet** (appendix pages 19 - 20) to help you track the responses you get from your contacts. Included on the second page of the worksheet are sections called successes and challenges. **Be sure to get this information as you speak to each contact.** We will use these responses in **step 4**.

Please note: Depending on the time of year you are completing this assignment, you may find you will be communicating with current or incoming officers and may have to adjust the questions accordingly.

Guiding Questions for Club Presidents

Membership

- What can you tell me about the members of your club (backgrounds, professions, etc.)?
- Have you experienced membership growth/decline in the last year? Why?
- What does your club do to make new members feel welcome and involved?
- Do new members stay with the club?
 - *If not, have those members given reasons for leaving?*
- Is the club actively recruiting new members?
 - *If so, what recruitment strategies are being used?*
 - *If not, why not?*
- Would you consider your club a 'healthy' club? Why or why not?
- What are some of your goals for membership in the coming year?
- What are some of your challenges/concerns regarding membership?
- How can I best support you?

Leadership

- How do you encourage leadership development in your club?
- Are you able to fill leadership positions? Why or why not?
- Are newer members encouraged to pursue leadership positions within the club?
- What are some of your challenges/concerns regarding leadership?
- How can I best support you?

Service

- What are some of your club's recent service projects? How did they go?
- Are future service projects planned? What are they?
- How well are service projects meeting the needs of the community?
- How does the club actively involve new members in project planning/implementation?
- What are some of your challenges/concerns regarding service in your club?
- How can I support you?

Communication

- Have there been any past challenges in communicating with the zone chairperson or with the district?
- What is your preferred method of communication?
- How often would you like to communicate?

General

- Does your club have a long-term plan in place that identifies action related to club operations, service, leadership development, and membership growth?
- Has your club participated in the Club Quality Initiative?
- Are there any other issues/challenges that you would like to discuss?
- What do you need from me to be successful?

Guiding Questions for Current Zone Chairperson

- How would you briefly describe each club in the zone?
- What challenges did you encounter during your term?
- How often did you communicate with the clubs/district governor/other members of the Global Action Team?
 - *Do you have any communication "best practices" you would like to share?*
- How many District Governor Advisory Committee meetings (zone meetings) took place during your term?
 - *Was the meeting attendance satisfactory? If not, how could it be improved?*
 - *What topics did you discuss at the zone meetings?*
- Do you have any other suggestions or best practices you would like to share that we have not already discussed?
- Are there any ongoing issues as we start the new fiscal year?
- Are there any district projects currently in process that we need to continue to support?
- What other obligations and meetings were you asked to participate in?

Guiding Questions for First Vice District Governor/District Governor Elect

- *What are your goals for our district?
 - *Do you plan to focus on any specific areas (membership programs, leadership development, service, LCIF, etc.)?*
- What do you expect from me as zone chairperson?
- What challenges do you foresee within our district?
 - *How can I assist you in overcoming those challenges?*
- How often would you like to communicate about what is happening in my zone?
- What is your preferred method of communication?
- Is there anything else you would like to discuss?

****Please be sure to bring one district governor goal with you, along with one zone chairperson goal of your own, to the Zone Chairperson Workshop to use in the Zone Goal Setting and Action Planning session.***

STEP 3: ANALYZE GUIDING QUESTION RESPONSES

After gathering responses from your contacts, you will want to reflect on the answers you have received. The Guiding Questions Response Analysis Worksheet (appendix on pages 21 -23) will ask you five questions that will help you build your current state analysis of your zone.

Use these answers as you work on the rest of your pre-assignment and be prepared to discuss your answers at the Zone Chairperson Workshop.

STEP 4: COMPLETE THE STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS (SWOT) WORKSHEET

SWOT analysis* is a strategic planning technique used to help a person or organization identify strengths, weaknesses, opportunities, and threats related to business competition or project planning. The SWOT term definitions are listed below to help you clarify your SWOT analysis.

- Strengths:** Strengths are activities your zone does well or are positive qualities that set you apart from zones that are average or struggling. **Think of processes in your zone that are producing results.**
- Weaknesses:** Weaknesses are things your clubs or zone lack, things that other zones do better than your zone, or resource limitations. **Think of processes in your zone that need improvement.**
- Opportunities:** Opportunities are favorable or advantageous circumstances, which if acted upon, can help position your club for growth and success. **Think of things that your zone has access to that could help it grow and become more successful.**
- Threats:** Threats are circumstances or events that can pose a risk to your zone's progress. **Think of things that your zone is exposed to that could limit its growth or success.**

***When conducting this type of analysis, strengths and weaknesses are internally influenced factors (factors that a club, zone or district can control) while opportunities and threats are externally influenced factors (factors outside of club, zone or district control).**

Workshop Pre-Assignment: Preparing for Your Term as Zone Chairperson

Use the SWOT Analysis Worksheet (appendix, page 24) and think about everything you have learned about your zone during your pre-assignment contact interviews. Using the **Successes and Challenges** sections on your Zone Assessment Guiding Questions Worksheet, write down five strengths, weaknesses, opportunities and strengths each for your zone. Be prepared to discuss these in the Zone Chairperson Workshop and be sure to use this analysis as you strategically plan for your term as zone chairperson.

APPENDIX

Pre-Assignment Worksheets

- Zone Pre-assignment Checklist
- Zone Guiding Questions Worksheet
- Guiding Question Response Analysis
- Zone Chairperson SWOT Analysis Worksheet

ZONE PRE-ASSIGNMENT CHECKLIST

Zone Chairperson Pre-Assignment Checklist

Use this checklist to complete all the steps in the pre-assignment.

Locate Zone Chairperson Resources

- Zone and Region Chairperson Web Page
- Zone and Region Chairperson eBook

Complete Lions Learning Center Online Learning Courses

- Conflict Resolution (complete all modules)
- Goal Setting

Communication Basics Review

- Read pages 5 - 10 to prepare to communicate with your contacts.

Interview Contacts Using Guiding Questions

- Read pages 11 - 13 to review the guiding questions to ask your zone contacts (Club Presidents, Current Zone Chairperson, First Vice District Governor or District Governor-Elect).
- Use the Zone Assessment Guiding Questions Worksheet on pages 19 - 20 in your appendix to record information gathered from each zone contact. Print as many worksheets as you will need for this step.

Guiding Question Response Analysis Worksheet

- Read the Analyze Guiding Questions Responses section on page 14.
- Complete the five questions on pages 21 - 23 in your appendix. Begin to think about one district governor goal and one zone chairperson goal that you can bring to the Zone Chairperson Workshop for the Zone Goal Setting and Action Planning session.
- Be prepared to discuss your responses in the Zone Chairperson Workshop.

Strengths, Weaknesses, Opportunities and Strengths Analysis Worksheet

- Read the Complete the Strengths, Weaknesses, Opportunities and Threats Worksheet section on page 14.
- Complete the Zone SWOT Analysis on page 24. Use your SWOT worksheet to help you formulate goals for your zone. Be sure to bring **one district governor goal** and **one zone chairperson goal of your own** to the Zone Chairperson Workshop.

ZONE ASSESSMENT GUIDING QUESTIONS WORKSHEET

Zone Assessment Guiding Questions Worksheet

Use this worksheet to record your responses.

Print as many of these sheets as you need to use during your zone assessment.

Contact Name, Title (and club name if applicable)		
Communication Preferences: Email, telephone, text, etc.		
Follow up needed?	Yes	No

Guiding Questions Responses Notes		

ZONE GUIDING QUESTION RESPONSE ANALYSIS WORKSHEET

Consider your responses from the guiding questions you used and review all the information that you gathered in your discussions. Then, answer the questions below. Your thoughtful analysis will serve as a basis for much of the discussion that will take place at the Zone Chairperson Workshop.

1. What did you learn about your zone that most surprised you? Why?

2. What is going well in your zone?

- 3. What opportunities exist for you to offer support to the clubs in your zone? Be sure to consider your role as an active member of the Global Action Team at the district level.**

- 4. Identify at least three major challenges in your zone.**

- 5. *Identify a preliminary goal for yourself as zone chairperson. Identify another goal that is also a goal that is shared by your district governor.**

Your goal:

Shared goal with your district governor:

**Be sure to bring both goals with you to the Zone Chairperson Workshop to be used in the Zone Goal Setting and Action Planning session.*

Zone SWOT Analysis Worksheet

<i>Strengths</i>	<i>Weaknesses</i>
<i>1</i>	<i>1</i>
<i>2</i>	<i>2</i>
<i>3</i>	<i>3</i>
<i>4</i>	<i>4</i>
<i>5</i>	<i>5</i>
<i>Opportunities</i>	<i>Threats</i>
<i>1</i>	<i>1</i>
<i>2</i>	<i>2</i>
<i>3</i>	<i>3</i>
<i>4</i>	<i>4</i>
<i>5</i>	<i>5</i>