



Constitutional, Regional & Area Leader Standard Operating Procedure

Last updated: July 7, 2019

2019-2020 Core Expectations (CA/RA/Area Leaders)

ONBOARDING	
<input type="checkbox"/>	Review Roles and Responsibilities
<input type="checkbox"/>	Review GAT Field Guide
<input type="checkbox"/>	Review Standard Operating Procedure document
<input type="checkbox"/>	Connect with GAT Regional Specialist Team
<input type="checkbox"/>	Review available resources
<input type="checkbox"/>	Connect with your field team and plan for the fiscal year.
<input type="checkbox"/>	Provide feedback on District Goals for your Constitution/Region/Area
<input type="checkbox"/>	Review important dates relating to opportunities for financial, programmatic and training support.
<input type="checkbox"/>	Review and understand training materials for MyLion/MyLCI or regional reporting tools, to support/promote use
<input type="checkbox"/>	Review and understand the technology and communication needs of your area and provide support as needed.
<input type="checkbox"/>	Review and understand LCI Reimbursement Policy and the GAT expense process
<input type="checkbox"/>	CA/RA Leader finalizes questions and method of progress report <i>(take into account time for translation and form building) CA/RA Only</i>

2019- 2020 IMPORTANT DATES

Onboarding Checklist Deadline

July 30, 2019

Initial Goals Review Deadline

August 2, 2019

Progress Report Questions Due

August 2, 2019

Executive Committee Meeting

Oak Brook, IL USA

August 13, 2019

LCIF Board of Trustees Meeting

Oak Brook, IL USA

August 15-17, 2019

Institute Grant Application Deadline

August 31, 2019

Goals Progress Review

September-October, 2019

ANZI Forum

Jakarta, Indonesia

September 5-8, 2019

USA/Canada Forum

Spokane, WA USA

September 19-21, 2019

CA/RA Progress Report Due

September 23, 2019

All Africa Conference

Lusaka, Zambia

September 27-29, 2019

Europa Forum

Tallinn, Estonia

October 4-6, 2019

International Board of Directors Meeting

Jackson Hole, WY USA

October 9-12, 2019

World Wide Report Day

October 14-18, 2019

OSEAL Forum

Hiroshima, Japan

November 7-10, 2019

CA/RA Progress Report Due

November 20, 2019

Follow up with districts on clubs pending suspension

December 2019

ISAAME Forum

Chennai, India

December 14-17, 2019

Executive Committee Meeting

Oak Brook, IL USA

January 7, 2020

LCIF Board of Trustees Meeting

Oak Brook, IL USA

January 8-10, 2020

FOLAC Forum

La Paz, Bolivia

January 15-18, 2020

CA/RA Progress Report Due

January 20, 2020

CA/RA Progress Report Due

March 16, 2020

District Funding Deadline

March 31, 2020

Goals Progress Review

March- April, 2020

International Board of Directors Meeting

Gdansk, Poland

April 2-5, 2020

World Wide Report Day

April 6-10, 2020

Executive Committee Meeting

Oak Brook, IL USA

May 11, 2020

LCIF Board of Trustees Meeting

Oak Brook, IL USA

May 13-15, 2020

CA/RA Progress Report Due

May 31, 2020

Follow up with districts on clubs pending suspension

June 2020

Last day to charter new clubs

June 20, 2020

International Board of Directors Meeting

Singapore

June 21-25, 2020

103rd International Convention

Singapore

June 26-30, 2020

OPERATIONS

Administration

Field Budgets

Each leader is allocated the following field budgets to be used on GAT related events:

- Constitutional Area (CA) Leader – US\$8,000
- Regional Area (RA) Leader – US\$5,000
- Area Leader – US\$3,000

You will not be reimbursed for expenses once you have exhausted your field budget so plan carefully!

If you would like to support another GAT leader (at any level), or cover a particular expense that will support a GAT endeavor, you may reallocate a portion of your budget.

When doing so, inform your GAT Specialists prior to the expense if possible, with an email to GAT@lionsclubs.org so we have a record and can use that email as your approval for when the expense claim comes in.

In an effort to meet CA goals, the constitutional and regional area leaders may need to utilize area leader field budgets. If this is the case, the constitutional/ regional area leader will advise their team and GAT Specialists ahead of time so everyone is aware of the adjustment and purpose.

Effective July 1, 2019 – Area leader field budgets **cannot** be used for expenses related to attendance at local leadership forums. If an additional hotel night is required to attend a pre/post forum meeting, that night's accommodation expense only can be reimbursed from the area leader field budget.

Constitutional/Regional Event Budgets

Each CA is allocated US\$7,500 and each of the 5 regions in OSEAL are allocated US\$2,500 to cover the costs of meetings, local summits, recognition, and overage in field budgets (if approved by CA/RA).

GAT District Funding Program

Effective July 1, 2019 – Multiple district and district operating budgets have been discontinued and a new District Funding Program has been developed. The new program is scheduled to roll out in the 1st quarter of 2019-20.

Each district is eligible to receive US\$500 for submission of a [GAT success story](#) (one submission per district). Any district GAT member (district governor, GLT/GMT/GST

coordinator) or the cabinet secretary, on record with Lions Clubs International for the current fiscal year, can submit their story on the GAT District Funding page. Submissions will be accepted through March 31, 2020.

In order to qualify, the success story should involve the district's GAT, take place **after July 1, 2017** and do one of the following: (1) show the impact of an action taken, (2) inspire the reader to do something, (3) show an action that the reader can take or (4) allow the reader to learn something.

Expense Reimbursements

According to LCI's [Reimbursement Policy](#), ALL EXPENSE CLAIMS MUST BE RECEIVED WITHIN **60 DAYS** OF THE DATE INCURRED. If claims are received after 60 days, they can only be paid if approved by the Treasurer of the Association.

Certify

Certify is a digital platform for expense processing. In August 2019, all GAT leaders will be set up in [Certify](#) and receive an email with their log-in information.

Certify is the association's preferred method of submitting expense claims as it will decrease the processing time – which allows you to get your reimbursement faster! It is very easy to use and also has a mobile version! More information to follow.

Expense Claims

If you prefer to use a regular expense claim, an updated excel version/writable pdf is available and should be sent directly to GAT@lionsclubs.org.

TIPS FOR FILING YOUR EXPENSES

- Write notes for yourself on your receipts (such as date, if cash/credit card was used, currency used, and if paying for a meal with others, list all names.)
- Remove the cost of liquor...that's a **no-no**! Unfortunately, we cannot pay for any alcohol consumed. Ask your server to put all of the liquor on a separate receipt to make it easier.
- If you are using an excel expense claim, you will need to use one expense claim per trip **AND** for one for each currency used. (It's a pain, we know...but in Certify, you don't have to!)
- Mileage/kilometers are always paid in US\$, so you may need to use a separate expense claim if you also had other expenses in another currency.

See the LCI [Reimbursement Policy](#) for more information.

Expense Reporting

A monthly expense report will be emailed to all constitutional area leaders, regional area leaders, and area leaders showing how much is remaining in each budget. If you have a

question on what is remaining, please reach out to us at GAT@lionsclubs.org directly and one of our staff GAT coordinators will assist you.

Travel

Area leaders should keep their constitutional area leader/regional area leaders updated on their travel plans.

CWT

Carlson Wagonlit Travel (CWT) is LCI's preferred managed travel program. It is very easy to use, convenient and consistent. You are able to get all your information in one place including your itinerary, flight changes, hotel booking and LCI's travel policy.

To make your airline reservations, please contact CWT at lionsclubs.us@contactcwt.com or 1-877-407-7410 – Ext. 7 VIP Desk. CWT will ask for the following:

LCI Account Code – **6902-5220 (for GAT related events only)**

Reason for Travel – **Name of Meeting/Event**

If you need assistance you can contact the LCI Travel Department at travel@lionsclubs.org or your GAT Specialist.

Airfare

Airfare should be booked at the lowest logical standard or discounted fare using the most direct route for the authorized class of service.

Airfare that is over US\$1,000 MUST receive an approval from the LCI travel department prior to purchasing airfare, a minimum of 14 days in advance. Complete the **fare approval form** and email it to GAT@lionsclubs.org. See the LCI [Reimbursement Policy](#) for more information.

Headquarters Visit

If you are traveling to Chicago or HQ for a visit or another meeting, reach out to your GAT Specialists. We would love to meet you while you are here! Also, if it's your first time to HQ, we can schedule a tour of the building for you.

New Leader Kits

Each year, at the beginning of the term, **new** constitutional area leaders, regional area leaders and area leaders will receive the following items:

Business Cards

One box of business cards (250 qty) will be provided per year. An additional box of business cards can be purchased for US\$14.00 + shipping utilizing your field budget.

Multiple district, district and clubs can purchase their business cards directly through [Club Supplies](#).

Name Badges

One GAT name badge will be provided. Leaders will be able to decide if they would like a magnetic or pin backing.

Additional name badges can be purchased for US\$5.15 + shipping for pin backing or US\$5.95 + shipping for magnetic backing, utilizing your field budget.

Multiple district, district and club name badges are available for purchase in [Club Supplies](#).

GAT Certificates

50 GAT certificates with instructions will be provided. GAT certificates are available for you to distribute to active Lions in their areas that deserve recognition for their work in advancing GAT projects and initiatives. These certificates are signed by the GAT Chairperson and can be distributed at your discretion. This certificate is available in the following languages: English, Finnish, French, German, Italian, Portuguese, Spanish and Swedish. After your initial supply is depleted, you may request an additional 50 certificates by reaching out to our staff coordinators at GAT@lionsclubs.org.

International Presidential Pin

One IP pin per year will be provided.

GAT Pins

50 GAT pins will be provided.

Appointment Process

Constitutional/ Regional/Area Leader

At the start of a new term, constitutional area leaders, regional area leaders and area leaders will be appointed by the incoming International President in consultation with the current International President, Second Vice President, Third Vice President and Global Action Team Chairperson and area leadership. Appointments will be for an annual year term, and are subject to review and/or removal by the International President in consultation with the Executive Officers.

Mid-Term Removals/Replacements

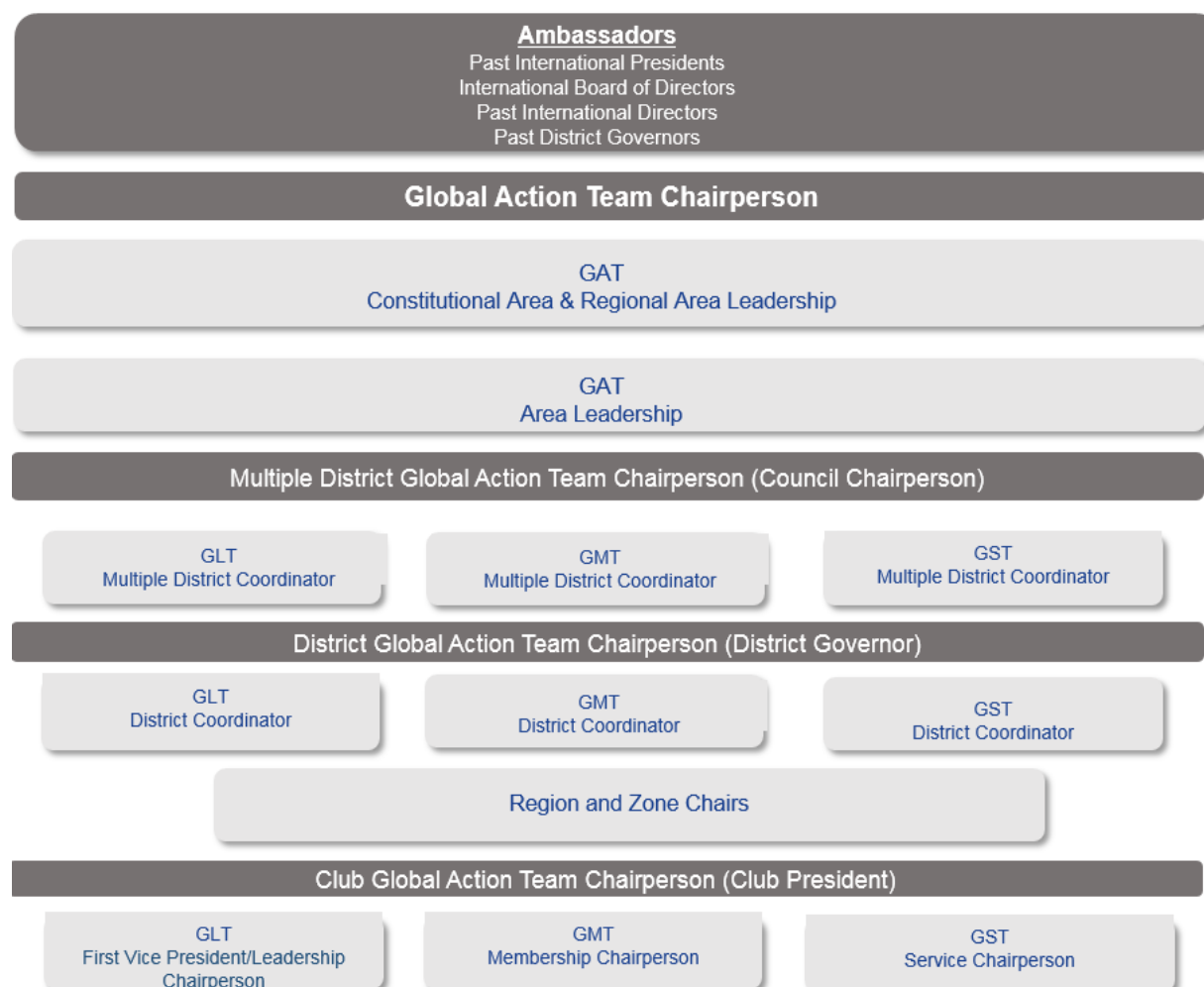
If a constitutional area leader or regional area leader would like to make a change to their area leader, or if a leader resigns and needs to be replaced, the constitutional area leader/regional area leader should email GAT Chairperson, PIP Kajit Habanananda at kajit.habanananda@lionsclubs.org and copy Noel Mason at noel.mason@lionsclubs.org. The email should contain (1) Name of leader to be removed/replaced (2) Reason why (3) Name of recommended replacement, Lions' title, and home district.

Multiple Districts, Districts

GAT multiple district/district coordinators shall be selected in accordance with the multiple district and district constitution and by-laws. Multiple districts and districts have the ability to enter in their appointments directly into MyLCI or their regional reporting system. The multiple

district coordinator's term is three years while the district coordinator's term is an annual appointment.

Field Leadership Team



GAT Focus Areas

1. District Goals

Each year, District Governor-Elects are asked to submit [Leadership](#), [Membership](#), [Service](#), and [LCIF](#) goals and action steps to LCI for their year as district governor.

With the lack of accountability and attention given to district goals in the past, we need your help in bringing goals to the forefront of the Global Action Team.

We ask that you:

- Review the goals set by your area's district governors before **August 2, 2019**.
- With the help of your GAT Specialists, provide support and ideas on how districts can accomplish their goals.

- Monitor the progress of each district and provide feedback on potential solutions to challenges before each board meeting.
- Celebrate those district governors that are on track to accomplish their goals in your progress report.

Progress Reporting

Progress reporting will be conducted five times a year for CA, RA and Area leaders. CA/RA reports should be sent to the GAT Chairperson, with a copy to your current international Directors and gat@lionsclubs.org.

CA/RA Reports will be due on:

September 23, 2019

November 20, 2019

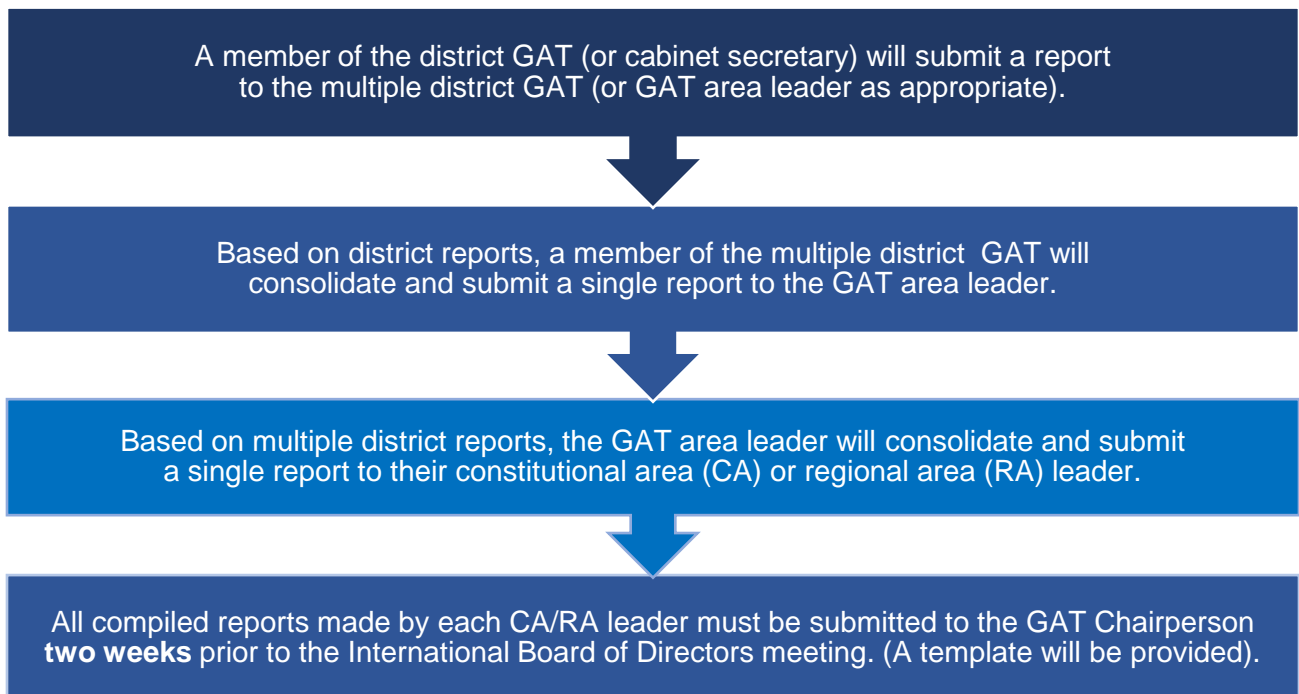
January 20, 2020

March 16, 2020

May 31, 2020

GAT staff will work with the constitutional area leader/regional area leader to develop an appropriate regionalized progress report for all levels.

Recommended Process



Recommended Timeline for MD and District Reporting

Task	First Progress Report Due Dates	Second Progress Report Due Dates	Third Progress Report Due Dates
CA Leader finalizes questions and method of progress report <i>(take into account time for translation and form building)</i>	August 2, 2019	January 24, 2020	April 15, 2020
District GAT report suggested due date	August 29, 2019	February 20, 2020	May 8, 2020
MD GAT report suggested due date	September 5, 2019	February 27, 2020	May 15, 2020
Area GAT report suggested due date	September 12, 2019	March 5, 2020	May 22, 2020
CA Leader sends Chairperson report Required	September 23, 2019	March 16, 2020	May 31, 2020
International Board of Directors Meetings	October 9 – 12, 2019	April 2 – 5, 2020	June 21-25, 2020

Worldwide Report Day

Two worldwide report day calls with each of the CA and RA leaders will be conducted after the October and April International Board of Directors Meetings. This will provide a good opportunity to discuss the CA/RA report that was submitted, discuss progress towards goals, challenges, successes as well as area leader performance.

2. Success Stories

The GAT message is best shared through storytelling; stories that focus on a one team approach and highlight how each pillar of the structure contributes to the others. GAT success stories should:

1. Show importance of GAT.
2. Inspire Lions to action.
3. Show what the GAT did (a how-to) to accomplish their goal.

GAT leaders are encouraged to share with LCI the stories of success that emerge from their districts and clubs. Share your stories by emailing LCI staff at GAT@lionsclubs.org.

3. Feedback Loop

Use the communication methods, such as social media and WhatsApp, among others listed in the field guide to accomplish the following:

GAT Specialists to GAT Field Leaders: GAT Specialists develop a routine, personalized communication plan and action calendar in collaboration with their leaders. Based on established needs, GAT Specialists will provide available tools and resources to support action planning and implementation.

Field GAT Activation: GAT leaders use their positions and regional expertise to maximize impact and assist districts as they accomplish their goals. Through the established communication methods, the GAT in the field are able to deliver the appropriate resources and messages to multiple districts, districts and clubs. This will allow leaders to gather feedback from forums and other convening points to provide in progress reports for presentation to the Board.

Leaders to GAT Specialists: GAT Leaders collect feedback and share their expertise with GAT Specialists during routine communications. GAT Specialists channel feedback to the appropriate LCI divisions to drive new tools, initiatives and resources.

The chart below shows how the field team works with GAT staff and how GAT staff works with the divisions to support, provide info/feedback or promote programs and initiatives.



4. Zone Chairpersons

As a member of the GAT one of your top priorities is to reinforce club level communications through the zone chairpersons in order to support initiatives and provide resources. Zone chairpersons will be utilized to ensure club officers are updated with the latest information and resources available through LCI, in addition to serving as a critical part of the feedback loop between clubs, districts and LCI headquarters. Ensure your area holds zone chairperson training early.

Technology

GoToMeeting/Webinar Account

If you are conducting a web meeting or regional webinar and need access to an account, you can schedule your meeting/webinar with your GAT Specialist. Please be sure to check with your GAT Specialist at least two weeks in advance to ensure another meeting/webinar is not conflicting. Access to this account is first come, first served.

BoardEffect

An internal team portal is available for each CA team to utilize. This is where resources and tools can be housed. BoardEffect also has collaboration tools within it – to help your CA/RA team communicate. Utilizing BoardEffect will be at the CA/RA leader's discretion. GAT Specialists can assist in building an appropriate strategy to utilize and set up your CA electronic board room and user accounts.

Single Sign-On

A centralized platform for MyLion, MyLCI, Insights and the LLC is now available. Take some time to explore the available options and let your GAT Specialists know if you have any questions. For a complete list of resources available through the single sign-on can be found in the GAT Field Guide.

GAT Meetings

Using the technology and communication methods available, encourage your multiple district/district to host GAT meetings at forums. If a meeting, seminar or booth will be held during your CA Forum, inform your GAT Specialist beforehand to assist with any material needed and to ensure expenditures are within budget.

Remember, if a meeting is held pre/post forum, only a one night-stay for the hotel can be reimbursed from the area leader's budget.

Convention

Convention will be held on June 26 – 30, 2020 in Singapore.

- A GAT seminar will be conducted highlighting success stories! Be sure to promote the GAT district funding so that we have many stories to choose from.
- A GAT booth will be in the exhibit hall and GAT staff will be available to answer questions.

- Exhibit hall sessions such as Campfires or Lions Den Stages are smaller presentations done by Lions for Lions. When convention staff opens up the application process, please consider applying to lead a session or identify leaders in your area to apply!
- A GAT leader meeting may be considered based on attendance.
- **Reminder, field budgets cannot be used for convention expenses.**

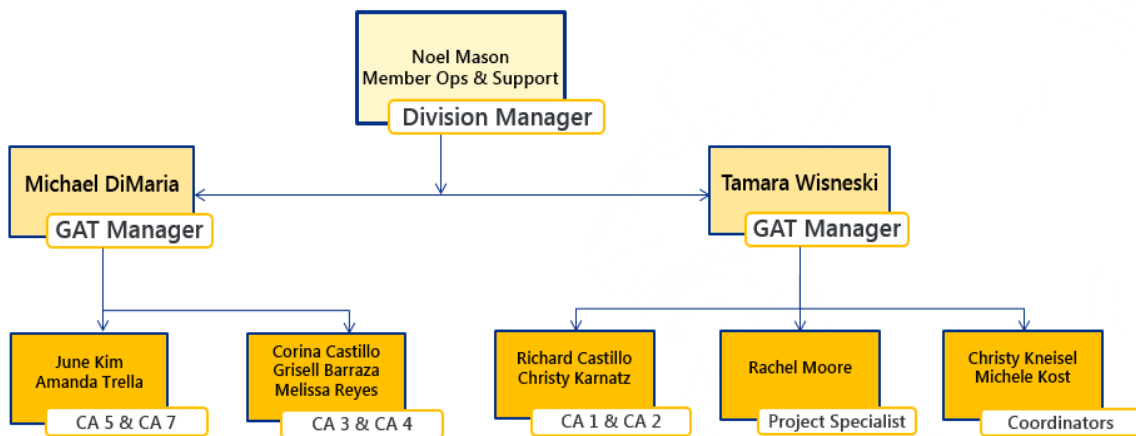
If you have any thoughts or ideas about how to enhance GAT's visibility or engagement at convention, please share them with the GAT Managers.

Staff Support

As a leader of the GAT, you are expected to take ACTION. Staff is always here to support you, but there may be times that we will not be able to assist you with your request. We will do our best to accommodate your request or provide you with alternative resources.

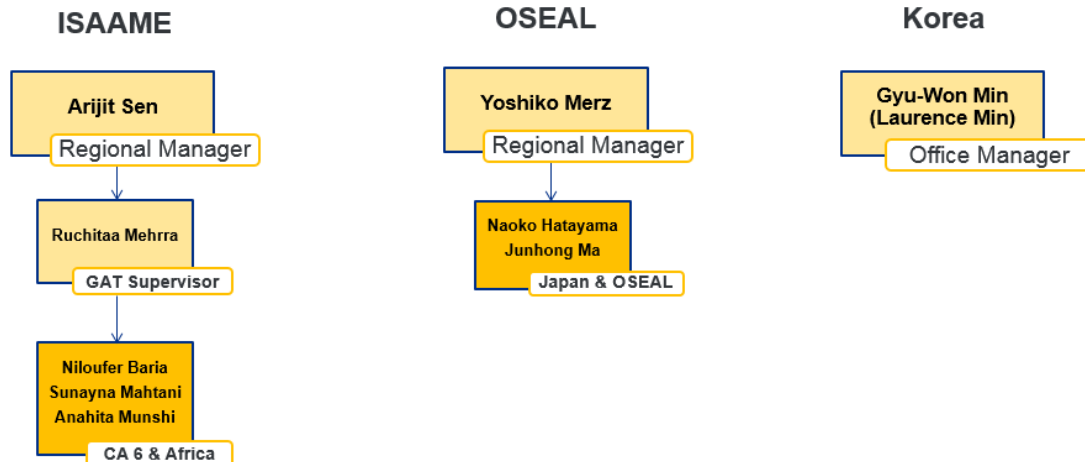
GAT Staff Direct Reporting Structure

Staff is structured to support leaders at all levels regionally.



GAT Regional Offices

Regional Offices allow GAT to provide around-the-clock support to our Lions globally.



Requesting GAT Specialist Travel

Multiple district and district conventions, as well as GAT-related summits and meetings, are the perfect platform to not only promote GAT, but to meet with multiple district and district GAT coordinators.

If you are in need of support during a GAT-related event and would like to have your GAT Specialist attend, please submit a [Staff Attendance Request Form](#) to GAT@lionsclubs.org as soon as you have identified the need for a GAT Specialist's attendance or plans have been confirmed for the event. Requests should be limited to one GAT Specialist per event. All forms must be submitted at least **four weeks** in advance of the scheduled event.

GAT Staff Contact Information

+1.630.203.3815

GAT@lionsclubs.org

Field Guide

Resources include:

- GAT Overview PPT and supporting material
- Roles and Responsibilities
- Technology/Reports
 - Insights, Service Reporting, Data Download
- Communication Methods
- Marketing/Branding Guidelines