

Club Excellence Process Pro

Participant Workbook



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PowerPoint Slides

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Dear CEP Workshop Participant,

Lions Clubs International is pleased that your club will be participating in the Club Excellence Process (CEP). 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.

This guide has been created to support you with each of these tasks. It provides you with an introduction to CEP, an overview of the four workshop steps, and all the material needed for each step. At the conclusion of the workshop, complete the workshop evaluation form included in your workbook. You should provide the evaluation to your facilitator.

It is important to remember that CEP is a *process*. It does not end at the conclusion of the workshop. You should work on the goals set in the CEP Workshop long after the workshop concludes with the help of your fellow club members, your CEP facilitator and possibly your district GMT and GLT coordinators.

For example, 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 help determine which areas were improved. You can even conduct CEP in your club every year to make sure your club stays on the road to excellence.

If you have any questions, please let us know.

Sincerely,

Membership and New Club Development Department CEP@lionsclubs.org

THE CLUB EXCELLENCE PROCESS

Program Overview

The Club Excellence Process 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:

Step 1: Why Are We Here? (45-60 minutes)	 ✓ 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 Community Needs Assessment
Step 2: What Makes an Excellent Club? (75-90 minutes)	 ✓ Complete the How Are Your Ratings? survey ✓ Determine the characteristics of an excellent club ✓ Identify obstacles to achieving club excellence ✓ Analyze ways to improve club effectiveness
Step 3: How Can We Determine Our Needs? (45-60 minutes)	 ✓ Review the Community Needs Assessment ✓ Review the How Are Your Ratings? survey results ✓ Identify club and LCI resources for achieving excellence
Step 4: What Can We Do Next? (45-60 minutes)	✓ Set goals for the future✓ Create action plans to achieve your goals



Welcome to the Club Excellence Process!











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Why Are We Here?
Step 1



Objectives of Step 1

- Establish why we are here
- Talk about what Lions can accomplish
- Discuss the needs of your community
- Discuss how to meet those needs

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CLUB EXCELLENCE PROCESS





Why Are We Here?



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Why Are We Here?

Community needs are still great

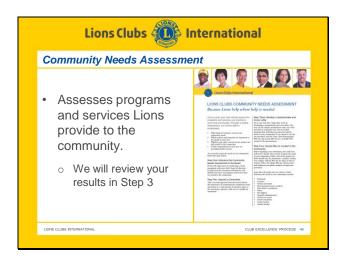
Have you noticed.

- A decline in service?
- A decline in membership growth?Unmet needs in the community?





Lions Clubs International Community Needs Example • What community needs are not being addressed? What tools can your club use to identify community needs?







What If ... members were 100% satisfied with their club?

Would they:

- invite their friends to join?
- participate more often on projects and in meetings?

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This Completes Step 1

In Step 2, we will be discussing the five characteristics of excellent clubs.

Any Questions?



What Makes an Excellent Club?

Step 2

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Objectives of Step 2

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

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Member Satisfaction Survey Results

- "I would have liked to have been involved in more worthwhile projects."
- Our club lacked communication. Every Lion should be informed of all club activities."
- "Our club had gotten quite small and had difficulty recruiting new members, so we chose to disband."
- "Members in my club did not allow other members to become office holders."
- "I overheard that I was to be inducted in a ceremony. I was never personally asked or informed."

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Characteristics of Excellence

- 1. Service-minded
- 2. Good communication
- 3. Strong membership growth
- 4. Retention of members
- 5. Effective leadership and club operations



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Service-Minded

What do you think service-minded means?

Why is it important to be service-minded?



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Good Communication

What does it mean to have good communication?



Why is it important to have good communication?

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Lions Clubs (International
Strong Membership-Growth Program
What does it mean to have a strong
membership-growth program?
* Y 6
Why is it important to have a
strong membership-growth program?
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LIONS CLUS INTERNATIONAL CLUS EXCELLENCE PROCESS 22
Lions Clubs (International
Retention of Members
Why is it important to retain
current members?
Why do members want
to be retained?
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Lions Clubs (International
Effective Leadership What does it mean to have effective leadership?
Why is it important to have leadership development in
your club?
Effective Club Operations

What does it mean to have effective club operations?

Why is it important to have effective club operations?



Group Activity



Make a list of obstacles preventing excellence.



What prevents us from:

- Providing good service?
- Having good communication?
- Having a strong membership program?
- Keeping members?
- Having effective club operations?

Lions Clubs International Do these comments sound like your club?

"We have a very good club and are well thought of in the community."

"It is a great organization. My wife and I are proud to be charter members of our club

"I love being a Lion. I think it is a great organization that serves the community in so many ways. It is a good opportunity to meet new people."

Lions Clubs International Or, does your club sound more like this?

"My Lions club experience led me to think this is a good ol" boys club that does not warmly welcome women or minorities."

> "I am leaving the Lions club. I do not want to spend all of my time fundraising. We had four different fundraisers going at one time."

"The local Lions club has a lot of talkers, but no doers. They meet once a week to eat supper and talk about the weather."

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Lions Clubs International Communication Internal communication

- · Maintain club website
- · Publish a club newsletter
- · Provide a membership
- Present member recognition and awards
- **External communication**
 - Post flyers on community bulletin boards
 - Place ads in places of worship's bulletins
 - · Advertise and promote your club in local media

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Membership Growth

- Invite new members to join
- · Establish a club membership committee
- · Complete a membership report at every meeting
- Establish an orientation schedule
- · Host an annual membership drive
- Promote membership retention care for those who serve as much as those we serve

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Club Development/Retention of Members

- · Induct, inform, involve and mentor new members
- Have a strong and active club administration
- Pay dues and club accounts in a timely manner
- · File reports in a timely manner
- · Hold regular, well-planned club meetings
- · Have regular board of directors meetings and report actions to club members

Leadership Training & Club Operations

- · Fill all offices with qualified Lions
- Elect a chairperson for each committee
- · Rotate leaders each year
- Have club leaders attend district leadership training, conventions and forums
- Encourage club presidents to obtain the President's Excellence Award

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This Completes Step 2

In Step 3, we will be discussing the results of the *Community Needs Assessment*, the *How Are Your Ratings?* survey and looking at resources.

Any Questions?



How Can We Determine Our Needs?

Step 3

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Objectives of Step 3

- Review the Community Needs Assessment
- Review the *How Are Your Ratings?* results
- Learn about resources to enhance your efforts



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Characteristics of Excellence Review

- 1. Service-minded
- 2. Good communication
- 3. Strong membership growth
- 4. Retention of members
- 5. Effective leadership and club operations



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Community Needs Assessment Review

What needs can we meet immediately?

- How many questionnaires were received?
- Were any Lions projects mentioned as successful?
- What unmet needs were identified by the community?
- How can we better meet needs?

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How Are Your Ratings? Review

- What club strengths did the survey reveal?
- What areas of improvement did the survey reveal?
- What actions should you take to improve your club?





Service Resources

- Community Needs Assessment
- Adopted Service Program
- Lions Learning Center Course, Providing Community Service
- Making it Happen: Guide to Project Development

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Communication Resources

- External communication
 - o Press release templates
 - o Public service announcements
 - o Print ads
 - o Public relations online course
- Internal communication resources
 - o e-Clubhouse
 - o Email

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Club Development Resources

- How Are Your Ratings? survey
- Lions Induction Program
- Lions Orientation Program
- Lions Mentoring Program
- Officer Installation Program
- MyLCI Web page
- Club Officer's Manual
- Lions Learning Center
- Membership
 Satisfaction Guide

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Leadership & Club Operations Resources

- Leadership Resource Center
 - o Lions Learning Center
 - o Presentations
 - o Lions Leadership Institutes
 - $\circ \ \text{Officer Installation Program}$
 - o MyLCI
 - o Club Officer Manual



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This Completes Step 3

Any Questions?



Excellent Characteristic Review Can you recall the characteristics of an excellent club? 1. Service-minded 2. Good communication 3. Strong membership growth 4. Club development / Retention of members 5. Effective leadership and club operations





Sample Goal Statements

- Service Complete a new service project in June.
- Communication Create and distribute press releases for three club events by May 1 of this year.
- **Membership** Recruit five new members by April 15 of this year.
- **Leadership** Train new club officers before they take office.
- Club development Have an agenda at every meeting this year.

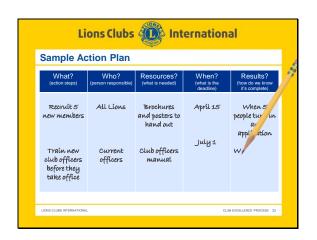
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Effective Action Plan Be specific Who, what, when, how. Sequential actions Milestones for celebration

Lions Clubs International Action Plan Content • What action will be done? • Who will be involved or responsible? • What resources are needed? • When will it be completed? • How will we know it's done, or how will we see results?









Program Review and Wrap-up

- Why are we here?
- Community needs
- Characteristics of excellence
- Survey and questionnaire review
- Improving effectiveness
- · Goal setting
- Action planning

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This Completes Step 4

Any Questions?

THE CLUB EXCELLENCE PROCESS GROUP ACTIVITIES

Step 1 (slide 14) List three needs

List three needs you think your community has.
1
2
2
3.
Step 2 (slide 13) Make a list of obstacles that prevent you from achieving each of the following characteristics: Providing good service:
Having good communication:
Having a strong membership program:
Keeping members:
Having effective leadership & club operations:

THE CLUB EXCELLENCE PROCESS GROUP ACTIVITIES

Step 2 (slide 23) Make a list of any resources you think would be helpful to support your assigned element to increase effectiveness: You may wish to refer to the Resource List in Step 3 of the CEP Participant Workbook to help you with this activity. Step 3 (slide 5) What high priority community needs did you find when completing the Community Needs Assessment? Step 3 (slide 6) Based on your How Are Your Ratings? survey completion, what are the areas in which your club could use improvement?

THE CLUB EXCELLENCE PROCESS GROUP ACTIVITIES

Step 4 (slide 7)
Create goal statements for each area of improvement you found in the How Are Your Ratings? survey

Step 4 (slide 12)

Take a goal statement from the last activity and develop a sample action plan.

What? (action steps)	Who? (person responsible)	Resources? (what is needed)	When? (what is the deadline)	Results? (how do we know it's complete)



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:

- 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 nonLion 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. Use the Just Ask! Guide as a refresher on the recruiting process and for invitation tips (Type "ME-300" into the search box at the top right hand corner of the Lions Clubs International website.)

Make the Membership Satisfaction Guide a favorite new publication—it can help your club keep current members happy with the club experience. (Type "ME-301" into the search box at the top right hand corner of the Lions Clubs International website.).

3. **Create a 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		Find resource online (type keywords into the search box of the LCI website)
	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 -	Resources to help with project prioritization.	Keyword = Lions Learning Center
	Providing Community Service	Guide for creating a project outline, plan, and promotional tactics.	⇒ Select "Providing Community Service" course.
	Covers 7 categories of LCI-adopted service programs: • 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

MEMBERSHIP GROWTH MATERIALS

Selection ()	Resource	Description	Find resource online (type keywords into the search box at <u>www.lionsclubs.org</u>)
	Club Membership Chairperson's Guide	Create membership invitation goals. Review the roles and responsibilities of the club membership chair. Discover how the chairperson can help increase club membership and also satisfaction.	Keyword = Club Membership Chairperson's Guide
	NEWJust Ask!: New Member Recruiting Guide for Clubs (ME- 300)	Share the joy of being a Lion. Guide your club through the recruiting process of and effectively manage club growth.	Keyword = Just Ask! OR ME-300
	Family Membership Program	Learn how families can volunteer together as Lions. This Web page is your access to event planning guides, a family membership brochure and more.	Keyword = Family Membership
	Student Member Program	Develop young leaders by inviting student members into the club.	Keyword = Student Member Program
	Leo to Lion Program	Program Make sure your area's Leos become Lions.	
	Young Adult Program	Ever wonder how to relate to a younger generation and invite them into your club? Access this page for a customizable brochure & promotional video for prospective members and recruiting information.	Keyword = Leo to Lion Program

COMMUNICATION MATERIALS

Selection (Y)	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.	Keyword = Lions Learning Center
		Learn how attract the media to cover your events or members.	⇒ 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 web site 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? survey	 Club Questionnaire (ME-15b) helps members rate their club on meetings, membership, and service. Administrative Guide (ME-15) helps clubs evaluate their members' responses. 	Keyword = ME-15 & ME-15B
	New Member Induction Ceremonies (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	Officer training on: 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.	 Click "Submit Reports" on the LCI website (located in top right-hand corner of each site page). Click "Lion Officers Login Here." 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</i> to <i>Goal Setting</i> .	Keyword = Lions Learning Center
	Membership Satisfaction Guide	Guide for keeping current members happy with the club experience.	Keyword= ME-301
	Other Available Resources		

LEADERSHIP DEVELOPMENT AND EFFECTIVE CLUB OPERATIONS MATERIALS

Selection (🗸)	Resource	Description	Find resource online (type keywords into the search box at www.lionsclubs.org)
	Constitutional Area Forums	Attend leadership presentations and seminars.	Keyword = Lions Clubs International Forums
	Lions Learning Center	From Valuing Member Diversity to Leadership to Goal Setting, 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.	Click "Member Center" tab on LCI website homepage Click "Develop Leadership Skills." Select "Development Programs."
	Ceremony for Installation of Officers for Lions Clubs	Induct officers soon after their appointment.	Keyword = LE-1
	MyLCI Web page	(See description for MyLCI in <i>Club Development Materials</i> section of Resource List.)	(See MyLCI in <i>Club Development Materials</i> 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</i> to <i>Leadership</i> to <i>Goal Setting</i> .	 Click "Member Center" tab on the LCI website homepage. Choose "Leadership Development." Click "Lions Learning Center."
	Other Available Resources:		

The Club Excellence Process Sample Action Plan

What?	Who?	Resources?	When? (what is the deadline?)	Results? (how do we know it's complete)
(Action Steps)	(person responsible)	(what is needed)	(what is the deadline:)	(now do we know it a complete)

Club Excellence Process Pro

Participant Evaluation of Workshop

Instructions

Please complete the following evaluation concerning your CEP Pro workshop experience. Your honest assessment of the process will help ensure that future clubs are provided with the information they need to make CEP Pro an effective and rewarding experience. **Responses are anonymous.**

Using a dark pen or pencil, circle the number that indicates your level of agreement with each statement. Use the space provided for any additional comments.

Pre-Workshop Preparation

Statement	Strongly Disagree					Strongly Agree
I understood the purpose of the workshop and why I would be attending.	1	2	3	4	5	6
I was aware of the dates and times of the sessions.	1	2	3	4	5	6
If applicable: My club had adequate time to complete the How Are Your Ratings? survey and the Community Needs Assessment before arriving at the workshop. (Respond only if your club was asked to complete the surveys prior to attending the workshop.)	1	2	3	4	5	6
I feel that I was adequately prepared to attend the workshop.	1	2	3	4	5	6

Steps 1-4

Statement	Strongly Disagree			_		Strongly Agree
The steps contained information that was practical.	1	2	3	4	5	6
The steps met/achieved the stated objectives.	1	2	3	4	5	6
The steps taught me something I can apply to improve my club.	1	2	3	4	5	6
The steps were a worthwhile experience.	1	2	3	4	5	6
The facilitator addressed participant's questions and lead discussion.	1	2	3	4	5	6

Post-Workshop

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

Comments				

Return this evaluation to your facilitator.

Share your CEP Success with LCI by submitting a success story on the membership communication webpage.



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