

Zone Chairperson Workshop

Assessing Club Health



Instructor Guide

SESSION BACKGROUND

In this session we will discuss the characteristics of a healthy club, how to access club health assessment reports, and which report indicators and resources you can use to improve club health in your zone.

SESSION OBJECTIVES

At the end of this session, participants will be able to:

- Identify Characteristics of Healthy Clubs
- Analyze Club Health Assessment Reports
- Use Available Resources to Boost Club Health

SESSION PREPARATION

Preparation Suggestions:

- **Consider using the internet (if available) to show the following handouts or order enough copies to share with your participants.**
 - **Your Club, Your Way** please contact clubofficers@lionsclubs.org
 - **Plan for Your Club's Success** please contact clubofficers@lionsclubs.org
 - **Club Quality Initiative** please contact clubqualityinitiatives@lionsclubs.org
 - **Board Policy Manual, Chapter 5** download and print from webpage
- **Review Chapter 5 in the Board Policy Manual.** *This will prepare you to discuss club statuses in modules 2 and 3.*
- **Consider the technical requirements for the session.** *Do a test of the laptop/computer, the LCD projector and screen, PowerPoint slides, and the wireless mouse/laser pointer, if available.*
- **Conduct an inventory of the materials for the session.** *Use the Training Materials Checklist in the Instructor Planning Guide to verify that you have everything you need for the session.*
- **Review all activities that will take place during the session.** *Have you obtained and organized all materials needed to complete the activities?*
- **Review content prior to the start of the session.** *Ensure that you understand the content and that you know how to execute the supporting activities.*

MATERIALS

- Instructor Guide
- Participant Manual
- PowerPoint slides

EQUIPMENT

- Computer
- LCD projector and screen
- Wireless mouse/laser pointer (optional)

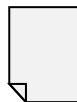
ACTION ICONS



**Refer to
Participant Manual**



Activity



**Distribute
Handout**

SESSION TIMELINE

	Overview of Instruction	Materials
INTRODUCTION <i>(5:00)</i>	Presentation: Session Objectives	PowerPoint slide
MODULE 1: <i>Healthy Clubs</i> <i>(10:00)</i>	Presentation/Discussion: Healthy Clubs	PowerPoint slides Participant Manual
MODULE 2: <i>Club Health Assessment Reports</i> <i>(30:00)</i>	Presentation/Discussion: Club Health Assessment Reports Activity: Club Health Assessment	PowerPoint slides Participant Manual
MODULE 3: <i>Club Health Resources</i> <i>(25:00)</i>	Presentation: Club Health Resources Activity: Using Club Health Resources	PowerPoint slide Participant Manual
CONCLUSION <i>(5:00)</i>	Presentation: Review Session Objectives	PowerPoint slides
Total Time: 75:00		

INTRODUCTION

Total Time: 5:00

PRESENTATION: SESSION OBJECTIVES (5:00)

State

In the pre-assignment for this workshop, you had an opportunity to talk to a representative from each club in your zone. You used a set of guiding questions to gain an understanding about the functioning of each club and the current state of the zone as a whole. In this session, we will explore other sources of information about the clubs in your zone and the resources available to support them.

Show

| *Display Slide 1: Session Objectives*



| *Read slide out loud to your participants. Answer any questions that they have about the objectives.*

State

In this session we will look at what constitutes a healthy club and what you can do if one or more of the clubs in your zone is struggling.

Ask

Do you have any questions before we start?

Module 1: Healthy Clubs

Total Time: 10:00

PRESENTATION/DISCUSSION: HEALTHY CLUBS (10:00)

Show

| *Display Slide 2: Healthy Clubs*



State

Let's start by exploring the idea of club health. Ideally, we would like every club to be a "healthy club". Circumstances fluctuate, however, so you need to monitor those situations to ensure they don't adversely impact the health of your zone clubs.

Show

| *Display 3:*
What are some characteristics of healthy clubs?



Ask

Before we get started, can anyone share what they think the characteristics of healthy clubs are?

Take answers from 4-5 participants. The answers you are looking for are:

- *Achieves membership growth and retains new members*
- *Conducts meaningful service activities*
- *Executes effective internal and external communication*
- *Holds positive and meaningful meetings*
- *Participates in leadership training*
- *Maintains a good standing or active status and reports regularly*

If your participants don't get all of the answers, lead into the next slide to discuss them.

Show

Display Slide 4: Elements of Club Health

Elements of Club Health

- Club achieves membership growth and retains new members
- Club members conduct meaningful service activities
- Club executes effective internal and external communications
- Club events held regularly and are positive and meaningful
- Club officers participate in leadership training
- Club is in good standing and reports regularly

State

Read the slide out loud to your participants tying in comments made on the last slide.

Ask

Think of the clubs in your zone. Do they all meet the criteria on this slide?

Call on 2-3 participants to share their thoughts on the health of the clubs in their zone. Then share the observation that most clubs go through adjustment periods over time and that it is important to act when you notice a club in your zone is struggling.

Transition

Next, we will look at club health assessment reports and how the indicators on that report can help you identify underlying club health issues.

Module 2: Club Health Assessment Report

Total Time: 30:00

PRESENTATION: CLUB HEALTH ASSESSMENT REPORTS (15:00)

Show

Display Slide 5: Club Health Assessment Reports



Ask

How many of you have accessed club health assessment reports?

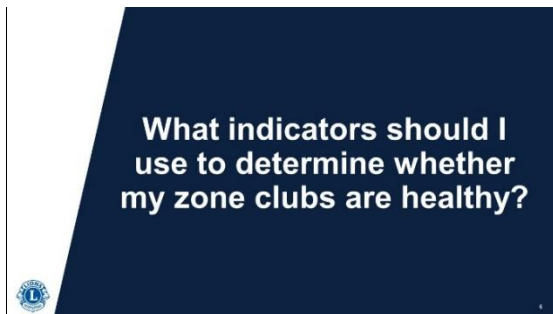
Depending on the answers you receive, you can decide if they need more guidance on how to use these reports or if a high-level overview will suffice.

State

Club health assessment reports are a great tool for quickly determining the health of the clubs in your zone. The focus of this module will be on reviewing report indicators and analyzing how these indicators can help you strengthen your zone clubs.

Show

Display Slide 6: What indicators should I use to determine whether my zone clubs are healthy?



Ask

At the start of this module, you asked participants if they have used club health assessment reports. If they have, call on those participants to ask what indicators they would use to determine if the clubs in their zone are healthy. If they haven't used these reports before then transition to the next slide to show them what those indicators are.

Show

Display Slide 7: Club Health Assessment

Club Health Assessment

Provides a quick look at:

1. Net Growth Y-T-D
2. Service Activity Reporting
3. President Rotation
4. Membership Reporting History
5. Club Status

State

Please note that if the Club Health Assessment reports are accessed from our web page they will be in English. If you need these reports in another language, please contact your district governor.

The club health assessment reports contain indicators that can be used to determine club health. Let's take a quick look at some of those indicators.

1. Net Growth YTD

This indicator shows if a club has been able maintain new members and growth. If there is a minus sign in front of the number, that indicates member loss. Remember, as the zone chairperson, it is your responsibility to support membership development by participating in efforts like the Global Membership Approach and supporting the achievement of growth goals for **MISSION 1.5**.

2. Service Activity Reporting

This shows how many months since an activity report was filed. Numbers in red indicate clubs that have not filed a service activity

report in over twelve months and N/R indicates a non-reporting club. This indicator can mean either the club isn't running service activities, or that they are having trouble reporting. If they have trouble reporting it could be due to technical issues, not understanding how to report, or a lack of motivation.

3. President Rotation

Repeat terms could indicate a need to encourage other club members to become leaders.

4. Membership Reporting History

This shows the number of months since membership rosters have been reported. Consistent membership reporting is critical to club health.

5. Club Status

Club statuses are another indicator of club health and are defined below:

Good Standing (Active): Good Standing or Active status means the club is in accordance with the provisions of the International Constitution and By-Laws and International Board Policy.

Status quo: Status Quo is a temporary suspension of the charter, rights, privileges, and obligations of a Lions club. The objective of status quo is to stop the activity of the club that is not fulfilling the obligations of a chartered club until the reason for placement into status quo is resolved or the club is cancelled.

Please note: As a zone chairperson, it is important for you to step in when it looks like a club might become or is already status quo. Conflict between club members can often be a contributing cause. If you have not yet taken the Conflict Resolution online course (as recommended on the Learning Map under Supplemental Training) please take this useful course before beginning your term.

Cancellation: When the infraction is severe and club cancellation is in the best interest of the association, a charter may be cancelled.

Rescinding cancellation: Rescinding cancellation means that the club status is being reactivated if club issues have been resolved.

Protective: A Lions club may be placed in protective status for the following reasons:

- War or civil insurgency
- Political unrest
- Natural disasters
- Any other special circumstances preventing a Lions club from functioning normally.

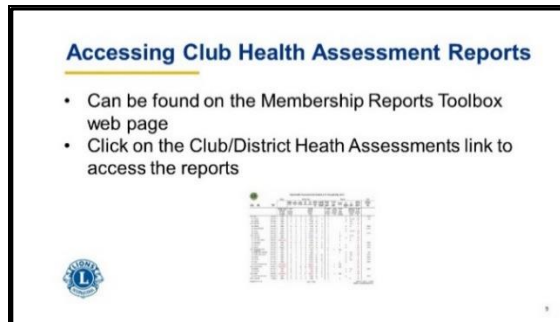
The club is released from protective status when the club is able to fully function, pay outstanding accounts and submit a reactivation report.

State

Analyzing these indicators shows you how your zone clubs are operating, and which ones need help.

Show

Display Slide 8:
Accessing Club Health Assessment Reports



State

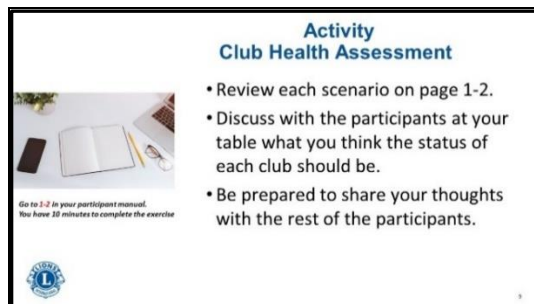
If you have good internet access, show your participants how to access these reports from our website (they can do this from their smart phones too). Otherwise read from the slide provided. Remind participants they can only access them in English on the website but can reach out to their district governors for a language copy.

To access these reports, go to our web page and use the search term “**Membership Reports Toolbox**”. Then click on the **Club/District Health Assessment link** to access the reports.

ACTIVITY: CLUB HEALTH ASSESSMENTS (15:00)

Show

Display Slide 9: Activity Club Health Assessment



State

We are going to look at some data for four imaginary clubs in your zone to get some practice at assessing club health.

**Activity Directions**

Refer participants to pages 1-2 in their Participant Manual to review the four scenarios and classify each club as either healthy, struggling, or in between. The answers can vary between participants. Use those differences to generate discussion.

Review the instructions on the slide.

***Ask if there are any questions.
Begin the activity.***

Call time after 10 minutes.

Ask for volunteers to share their ratings for the four clubs.

The answers that you are looking for are:

- ***Club 1 should be a healthy club.***
- ***Club 2 could either be a healthy club (although one with leadership issues) or a club that is somewhere between (again due to the leadership rotation issues).***
- ***Club 3 should be a club that is struggling.***
- ***Club 4 should be a healthy club but has a reporting issue.***

Transition

Now that we have had an opportunity to look at club health assessment reports, let's look at resources that can help you boost club health in your zone.

Module 3: Club Health Resources

Total Time: 25:00

PRESENTATION: CLUB HEALTH RESOURCES (15:00)

Show

| *Display Slide 10: Club Health Resources*



State

Understanding the indicators is only part of the solution; knowing where to find the resources that can help you resolve club health issues is also part of the solution.

Show

| *Show Slide 11:
What resources are available to help boost club health?*



Ask

Can anyone name an available resource that can help resolve club health issues?

The answers you are looking for are the Club Health Assessment Action Strategies, any of the resources on the Improving Club Quality webpage or their peers. If the participants aren't giving you these answers, then use this as an opportunity to lead into the next slide.

Show

Display Slide 12: Available Club Health Resources



Read the slide out loud to your participants.

State

As you can see there are resources available to help you with zone club health issues. In this module we will discuss strategies for using them.

Show

Refer participants to pages 3-4 in their Participant Manual.

[illegible]

Club Health Assessment Action Strategies


Mentors since the club first met in 2008	Club met using the WOMER	Contact Club Secretary to make sure they have been assessed and to add if needed. Instructions on how to submit the report. Inform the Club Secretary of any additional information or provide contact information from an experienced club member.
Have been told Club Health Report (PH) (S2)	Club has not reported club officers for past a year	Contact the club to see them to report Club officers. They can be reported on a MJO or on using the paper officer assessment form (PH) (S2). If the secretary needs assistance, guide them through the reporting process. If electricity has not been laid, work with the club to ensure greater assistance. Provide training and encourage to view officers and encourage them to attend crew meetings.
President/Headman	Contact President has warned more than 2 years continuously	They may indicate a lack of new blood. Encourage the club to elect new officers each year and consider club health. Consider how long they have been in the club to strengthen the club.
No better idea?	Members of the club do not have an active role?	Use officer assessment form (PH) (S2) to assess club health. Having an active role is critical to the club. Contact the club to discuss uncompleted email addresses. Update should be made by the club secretary on MJO.
Mentors/Service Activity Report	Provides the number of records since the last on-the-club activity report	Contact the club to see if they have training opportunities from their activities report . Note that paper reports are not tracked and the report of encouragement are not submitted. If the club has been on activity to report, encourage them to conduct the "Mentor's Report" exercise to uncover possible issues.
CLUB		
Discussions for current club page	Indicates discussions from the club or a member of the club	If a club has reported that a discussion was made and it was not reported on the report, contact the club secretary (PH) (S2) to see if the report was received and properly posted on dues or is unidentified.

15

State

It is better to use the online version as it contains links. Use the search term “**Club Health Assessment Action Strategies**” to find it online. This resource is also located in your participant manual on pages 3 and 4.

Show



The screenshot shows the 'Improving Club Quality' webpage. At the top, there is a navigation bar with links: 'Discover Your Club', 'Explore Your Network', 'Start Your Service', 'Support Your Function', and 'Resources For Leaders'. Below this is a search bar with a magnifying glass icon. The main heading is 'Improving Club Quality'. Below the heading, there is a paragraph: 'Effective clubs provide meaningful service, organize a strong and active membership and continually develop new leaders. The tools below focus on these elements to help your club function effectively while meeting the needs of your community and your members.' Below the paragraph is a list of links: 'Your Club, Your Way', 'Support for a Stronger Club', 'Club Quality Initiative', 'Club Excellence Award', and 'More Resources'.

State

Next, we will discuss the **Improving Club Quality** webpage. This webpage contains the following additional resources that will help you resolve club health issues:

- Your Club, Your Way
- Plan for Your Club's Success
- Club Quality Initiative
- Club Excellence Award
- Other club related links such as the Standard Form Club Constitution and By-Laws, Standard Club Structure, and Leadership Development links

Show***Display Slide 16: Resources******State***

While there are many resources available for you to use to address club health issues, we will focus on the resources listed below.

Your Club, Your Way! focuses on helping clubs customize meetings to better suit the needs of your club members, which in turn will help with their retention.

Plan for Your Club's Success uses a planning guide and PowerPoint to help you discover your club's strengths, ways to improve and new opportunities that will help your club grow and thrive!

Club Quality Initiative is a strategic planning tool to help clubs identify opportunities for improvement. By understanding current operation, identifying areas that may be improved and taking measured steps to accomplish goals, every club can be even better.

Club Excellence Award could be used as motivational tool to rally members in your club. You could also use this initiative to increase membership and promote more compelling service activities to attract prospective and maintain regular members

Show

| *Display Slide 17: Your Peers*

**State**

Don't forget to use your peers as a resource. Network with others who have been zone chairperson as they can provide valuable insights you can use during your term. Also, remember to communicate plans to support club health with the district governor and other helpful members of the district team.

ACTIVITY: USING CLUB HEALTH RESOURCES (10:00)**Show**

| *Display Slide 18: Activity Using Club Health Resources*

A presentation slide titled "Activity Using Club Health Resources". It includes a list of three bullet points: "Review each club scenario on pages 1-2.", "Write down which resources you would use for each scenario.", and "Be prepared to share your thoughts with the rest of the participants." On the left side of the slide, there is a small image of a desk with a smartphone, a laptop, a pen, and a notebook. Below this image, there is a small text box that says "Go to page 5 in your participant manual. You have 10 minutes to complete the exercise." The Lions International logo is in the bottom left corner.

- Review each club scenario on pages 1-2.
- Write down which resources you would use for each scenario.
- Be prepared to share your thoughts with the rest of the participants.



Activity Directions

Ask your participants to return to the four scenarios on pages 1-2 in the Participant Manual. Give your participants the following directions:

State

Let's practice applying the tips from the Club Health Assessment Action Strategies document and your knowledge of the resources we reviewed. Please read the club 1-4 scenarios again. This time you will decide what actions to take and what resources to recommend that will help each of them with their club health issues.

The resources you have to work with are:

- Club Health Assessment Action Strategies
- Your Club, Your Way
- Plan for Your Club's Success
- Club Quality Initiative
- Club Excellence Award

Now that you know what resources to use and have reread the scenarios, write down in your participant manual on page 5 what actions and which resources will be the most effective in helping with these club scenarios.

Tell your participants to be prepared to share their examples in class.

Ask if there are any questions.

Begin the activity.

Call time after 6 minutes.

Debrief by asking for volunteers to share their ideas for helping the four clubs.

Answers

The suggested answers are below but if your participant can make a case for using a different resource, accept their answer.

Club 1 could use the Club Excellence award since their reporting metrics are good. They could use this to motivate their club to exceed their numbers.

Club 2 seems to have a leadership issue. According to the Club Health Assessment Action Strategies resource, the zone chairperson could encourage the club to elect new officers each year to build the club's leadership base, bring new ideas into the club and strengthen the club.

Club 3 has lost members, has a president who has repeated 3 terms, it's been months since they have reported, and their status is Status Quo. They could use Plan for Your Club's Success and other tips mentioned on the Club Health Assessment Action Strategies as their resources.

Club 4 has an active status and is slightly behind in their reporting. According to the Club Health Assessment Action Strategies resource, the zone chairperson could contact the club to find out if they need help with service activity reporting or with finding new ideas for service activities and recommend resources accordingly.

Transition

The one resource we didn't talk about in our activity is using your peers. Your peers are always a good resource for advice and support, and they can help you keep perspective. In addition, remember to enlist the support of other members of the district team to help you maintain the health of clubs in your zone.

Ask

Before we close the session, does anyone have questions about what resources are available to you to resolve club health issues?

CONCLUSION

Total Time: 5:00

PRESENTATION: REVIEW SESSION OBJECTIVES (5:00)

State

Monitoring club health, and taking steps to support struggling clubs, is an important part of your responsibilities as zone chairperson.

Ask

How do you plan to use the reports and resources reviewed in this session to support club health in your zone?

Answers will vary. Encourage participants to use the reports and resources to refine their action plans. In addition, the reports can be reviewed regularly to check progress on goals.

Show

Display Slide 19: Review Session Objectives



State

Have we met our objectives today?