

CLUB BRANCH GUIDE



Lions Clubs International

Club Branch Guide

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Why Organize a Club Branch?

A club branch enables a small group of people to form a Lions club and start making a difference in their community sooner. Branch members are part of an existing “parent” club, but hold independent meetings and select their own projects and activities. Forming a branch creates an opportunity for Lions clubs to expand when there are less than 20 members and chartering a new club is not possible. At least five branch members are needed when forming a branch.

When a club branch is opened, a club branch banner patch and a club branch pin (to be presented to the branch liaison) are sent to the parent club president.

Steps to Club Branch Formation

Step 1: Determine Areas of Opportunity

Branches may be formed anywhere within the parent club’s district, preferably in an area not currently served by a Lions club. If the proposed branch is in an area that is being served by one or more existing clubs, the parent club must receive the existing club’s written permission. Only one branch is permitted per location; however a club may have more than one branch. Most importantly, the needs of the community should be considered in forming a branch, including:

- Size of the population
- Current service clubs and community organizations
- Local project possibilities and benefits for the area
- Groups of people who are not currently being invited by existing Lions clubs
- Young professionals, women, ethnic communities and other underrepresented groups

A special interest club branch or a campus club branch may also be a unique area of opportunity.

Step 2: Recruit Members

When developing a list of potential branch members, consult the district governor, cabinet members, past district officers, local merchants and other contacts Lions may have in the branch location. Include local community and business leaders who may be interested in branch activities. Before a parent club begins actively recruiting members, the club should notify the district governor of its intentions to form a branch. Once a list of possible members is compiled, the parent club can host an informational meeting.

Protesting a Club Branch

The formation of a branch may be protested by the district governor or a chartered Lions club according to the same rules and procedures for protesting the formation of a charter Lions club.

Step 3: Host an Informational Meeting

Informational meetings are intended for Lions to meet with potential members and discuss the formation of a branch. The meeting should help generate interest in becoming a Lion. Some informational meeting discussion topics might include:

- How a branch can help the community
- Examples of parent club projects and potential branch projects
- Explanation of support provided by the parent club, district, multiple district and International Headquarters
- Testimonials from parent club members explaining what they have gained by being a Lion
- Completing the Membership Application (ME-6B)

Following the informational meeting, contact the participants to thank them for their time, confirm their interest and invite them to attend an organizational meeting. Encourage them to bring friends, family, co-workers or anyone else who may be interested in joining the branch.

Detailed information on hosting an informational meeting can be found in the Guide to New Club Formation (TK-1).

Step 4: Host an Organizational Meeting

An organizational meeting is the first meeting of the proposed branch. It is attended by potential branch members, parent club representatives, the district governor, cabinet members and any other interested individuals. The parent club president, branch liaison, district extension chairperson, past officer or any qualified Lion may conduct the organizational meeting. The parent club can publicize the development of a branch and the service projects the branch wants to undertake through local media.

Some organizational meeting discussion topics should include:

- Information about branch operations
- Membership responsibilities
- Structure and history of Lions Clubs International
- Detailed explanations of each officer position
- Branch dues structure
- Naming the club

During the organizational meeting, club branch officers should be elected. Club branches elect a president, secretary and treasurer to lead the club branch. The parent club appoints a branch liaison to serve as the go-between for the parent club and the club branch.

Detailed information on hosting an organizational meeting can be found in the the Guide to New Club Formation (TK-1).

Step 5: Submit the Notification of Club Branch

After the organizational meeting, branch officers should complete the Notification of Club Branch (CB-1). This form should be given to the parent club for submission to International Headquarters. The Notification of Club Branch form must be completed in order to form a branch and will establish a branch record in the parent club's file at International Headquarters.

The branch officers should also fill out and sign the Report of Branch Members (CB-2) to be given to the parent club. The parent club can either send this form to International Headquarters or update branch members using the WMMR.

Club Branch Name

The branch name should include the location of the branch, with the designation "branch." The branch should not include a trademarked name and must follow guidelines established by Lions Clubs International. Lions Clubs International suggests the branch name be different from the parent club. Ideally, the branch name should be the name the club would take when they become a fully chartered club. Refer to the Lions Clubs International Board Policy Manual for more information.

Parent Club Roles and Responsibilities

It is the role of the parent club to assist the branch in obtaining and maintaining a high level of commitment, activity and enthusiasm. The success of the branch involves continued contact, interest, council and advice from the parent club. The parent club is required to:

- Assist in the formation of the branch
- Nominate an experienced Lion to be the branch liaison
- Submit the Notification of Club Branch (CB-1) to International Headquarters
- Submit the Report of Branch Members (CB-2) to International Headquarters, or update members using the WMMR
- Process membership applications and see that each application is properly approved and reported to International Headquarters
- Help develop a membership retention and growth plan
- Ensure branch officers receive proper orientation, support and training
- Ensure the elections for branch officers are properly held each year
- Encourage branch members to participate in parent club and district activities
- Submit branch supply orders to International Headquarters
- Update club officers with Lions Clubs International using the Notification of Club Branch (CB-1)

Club Branch Executive Committee

The club branch executive committee is made up of the club branch officers (branch president, branch secretary, branch treasurer) and the branch liaison. Branch officers serve until the close of the first fiscal year. The fiscal year for Lions Clubs International and all clubs is July 1 to June 30. If their first term is less than a full year, they may serve through the branch's second fiscal year, but this requires re-election by the members. [The position of branch president is not a prerequisite for any district service position, including region/zone chairperson and district governor.]

The executive committee is responsible for executing policies approved by the parent club, along with the following:

Club Branch President

- Serve as the leader of the branch
- Serve on the parent club's board of directors
- Attend board meetings and/or general meetings of the parent club
- Become familiar with the parent club's constitution and by-laws and other important practices
- Regularly communicate with the parent club and receive all necessary statements
- Establish a plan for the year*
- Form committees to support branch operations*
- Issue calls for all meetings
- Provide the monthly financial report to the parent club
- Plan and select community service activities**

* See the Club Officers Manual (LA-15) for more information

** Consider using the Community Needs Assessment (MK-9)

Club Branch Secretary

- Serve as the administrator of the branch
- Maintain general records of the club such as minutes, attendance, elections and membership

- Submit new members, member drops, transfer members and other membership changes to the parent club using the Branch Membership Update Form (CB-2)
- Use the Notification of Club Branch (CB-1) to update branch officers and submit to the parent club
- Prepare and provide a report of branch activities to the parent club using the Monthly Branch Activity Report
- Collect and turn dues over to the club branch treasurer
- Issue statements to each member for dues and other financial obligations owed to the parent club
- Serve as the editor, or communicate regularly with the editor of the branch newsletters
- Respond to inquiries and requests made to the branch

Club Branch Treasurer

- Work with the branch president to create branch budgets
- Record payments and deposits for the branch, along with managing the branch budgets
- Prepare the monthly financial report to give to the club branch using the Branch Record of Payments and Deposits
- Receive dues money from the branch secretary, and submit to the parent club treasurer
- Pay branch bills upon the authorization from the parent club's board of directors

Branch Liaison

- Serve as an officer of the branch's executive committee
- Maintain open communication between the parent club and the club branch
- Provide assistance to the branch, similar to that of a guiding Lion
- Develop a positive relationship with the members of the branch
- Help the branch president prepare the Monthly Branch Activity Report
- Keep the branch aware of all parent club activities and policies that affect the branch
- Attend branch meetings

Club Branch Membership

Branch Member

Any person of legal majority with good character and good reputation in his or her community may be invited to become a club branch member. The person must have approval from the parent club to become a member.

Members of the branch are encouraged to attend the general meetings of the parent club. Branch members are voting members of the parent club when in attendance at the parent club's meetings. Branch members are calculated in the parent club's quorum only when present, in person or at the parent club meetings. Branch members may also serve on branch committees. Any branch member may serve on the parent club's board of directors if elected.

Dues

The entrance fee for each new branch member is US\$25. Current members from other clubs or individuals who left a Lions club in good standing within 12 months may transfer to the branch at no charge. Discounts are available for qualifying family units, students, graduating Leos and young adults. Branch members pay the same amount of dues that are required of members of the parent club. Checks issued for dues and entrance fees should be made payable to the parent club.

Insurance Coverage

The branch, as part of the parent club, receives liability coverage as provided by Lions Clubs International. The parent club secretary has a comprehensive booklet explaining this coverage.

Adding a New Member

When adding a new member to the club branch, the Membership Application (ME-6B) should be submitted for approval by the parent club's board of directors. The parent club then either submits the Branch Membership Update (CB-2) with the Monthly Membership Report, or enters the member online using the WMMR.

New Member Kits are available from the Club Supplies Department (clubsupplies@lionsclubs.org) and should be ordered by the parent club secretary for each new branch member. Each kit includes a New Member Welcome Book, membership certificate, Lions emblem pin and decal.

Adding Branch Members to the WMMR

Once the Notification of Club Branch (CB-1) has been received by International Headquarters, parent club secretaries have the option of selecting the club branch name on the basic member information tab as a membership type in the WMMR when adding members. If the WMMR is used, the Report of Branch Members (CB-2) does not need to be submitted to International Headquarters.

Membership Changes

When dropping a member or updating membership information, fill out the the Branch Membership Update (CB-2) and submit to the parent club secretary.

Branch Operations

Meetings

Lions clubs are encouraged to meet at least twice a month, and club branches are also encouraged to do the same. Attendance at branch meetings fulfills parent club's meeting attendance requirements. Some branches have one general meeting and one executive committee meeting. Well planned meetings, with a strict time limit, are very important and general executive committee meetings must have an agenda. The Club Officers Manual (LA-15) can provide information on planning a meeting.

Constitution and By-Laws

Since the branch is part of the parent club, it is governed by the parent club constitution and by-laws. The Standard Form Constitution and By-Laws (LA-2) is recommended by Lions Clubs International. In addition to the parent club's constitution and by-laws, those of the international association, multiple district and district govern Lion activities, along with policies adopted by the International Board of Directors.

Newsletter

Each branch should publish its own newsletter. Because the branch secretary is often one of the most informed branch members, he or she is typically given the added responsibility of being the newsletter editor. If someone other than the branch secretary is chosen to edit the newsletter, they should maintain close contact with the branch secretary to ensure that all important branch news is published.

Recruiting

A branch must have active members to effectively serve the community. If possible, designate a member to oversee membership recruitment or establish a membership committee. Recruiting for a club branch is very similar to recruiting for a traditional club. Consult your branch liaison and parent club officers for recruiting ideas. You can also use the Club Branch Brochure (CB-17) to explain to potential members what the purpose of a club branch is, or use the Club Brochure Template (MK-20A) which allows you to customize a brochure specifically for your club.

Branch Financing

Budget

Most branches use the budget system of financing, which includes anticipating in advance the income and expenses of the branch for a specific period, then preparing a budget. Budgets should not be considered as mandates or approvals for spending, but rather guidelines. All checks and vouchers should be signed by the parent club's treasurer and counter-signed by a branch officer, as determined by the parent club's board of directors.

Your branch should have two budgets for the fiscal year (July-June):

1. **Administrative Budget:** The administrative budget finances branch operations. Its income comes mainly from dues, but may also include raffles, increased meal costs, fines and auctions.
2. **Activities Budget:** The activities budget finances the branch's activities and projects. Its income should come from special fundraising projects put on by the branch in the community.

Fundraising

The parent club should establish an account for funds raised by the branch. This money should be used for the branch's activities budget. Under no circumstances can any of the income from the branch's fundraising projects be used to defray branch administrative costs, however, legitimate expenses directly related to the fundraiser can be deducted.

Ordering Club Supplies

The Club Supplies Catalog is available on the Lions Clubs International Web site. Items that do not require personalization can be ordered directly from International Headquarters with a credit card or other advance payment. Items personalized with the branch name and include the parent club's name must be ordered through the parent club. Only the parent club secretary may order supplies on an account.

Converting a Branch and Applying for Charter

When a club branch reaches 20 members, it may consider becoming a charter club. The New Club Extension Kit (KITEXT) is available to assist. In addition, a Club Branch Conversion Form (CB-21), signed by the parent club secretary, must be submitted with the new club application to waive the charter transfer fee and signal to Lions Clubs International that the branch has closed.

Dissolving a Branch

A branch may be dissolved without charter by a resolution that receives a two-thirds vote by the parent club's board of directors. If the branch is dissolved, the branch members become active members of the parent club and should be encouraged to participate in parent club activities. Written communication from a parent club officer or district officer must be sent to International Headquarters when a club branch is dissolved. E-mail: clubbranch@lionsclubs.org.

Club Branch Resources

The following resources can be obtained by searching the Lions Clubs International Web site (www.lionsclubs.org) or contacting the Membership Programs and New Clubs Marketing Department

Club Branch Kit

- Club Branch Guide (CB-4)
- Club Branch Brochure (CB-17)
- Notification of Club Branch (CB-1)
- Branch Membership Update (CB-2)
- Club Officers Manual (LA-15)
- Membership Application (ME-6B)
- Constitution and By-Laws (LA-2)
- Club Branch Conversion Form (CB-21)

Other Resources

- New Club Extension Kit (KITEX)
- Guide to New Club Formation (TK-1)
- Charter Night Planning Guide (TK-26)
- Community Needs Assessment (MK-9)
- Club Brochure Template (MK-20A)
- Instructions for Using the Club Brochure Template (MK-21B)

Membership Programs and New Clubs Marketing Department

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