



Lions Clubs International

CLUB BRANCH GUIDE



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.



Before recruiting branch members, notify the district governor and any club(s) that may serve the same community of the intention to form a 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 Lions club.

Steps to Club Branch Formation

Step 1: Create a Club Branch Plan

When forming a club branch, three things should be considered: (1) where the branch will be located, (2) what type of members the branch will consist of and (3) what the focus of the branch will be.

Where will the branch be located?

Branches may be formed anywhere within the parent club's district. Most importantly, the needs of the community should be considered in forming a branch. Consider conducting a [Community Needs Assessment](#) to identify what kinds of service projects the community wants and needs.

Who will the branch consist of?

At least five branch members are needed when forming a branch. Consider whether the branch will have general membership or be comprised of a specific group of people. Are there Omega Leos reaching the maximum age of Leo membership in the community who would like to start a branch? Do the young adults in the community want to do things differently than the parent club, but still want to learn from them by being part of a branch? Other groups to consider are women, veterans and local ethnic communities.

Will the branch have a specific focus?

Determine if the branch will have a specific focus. For example, the branch could focus on one specific need of the community such as supporting Special Olympics athletes or caring for the environment. Or would the branch rather take up projects for the community as needs arise?

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. Reference the [Just Ask! New Member Recruiting Guide for Clubs](#). While *Just Ask!* guides Lions clubs through the process of recruiting new members and effectively managing club growth, the same principles can be applied to recruiting club branch members. Once a list of possible members is compiled, preparations for the informational meeting can begin.

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](#)

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.

Step 4: Host an Organizational Meeting

An organizational meeting is the first meeting of the proposed branch. Attendees include potential branch members and may include 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.

Some organizational meeting discussion topics should include:

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

Also 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.

Step 5: Submit the Notification of Club Branch

After the organizational meeting, complete the [Club Branch Application/Officer Update](#) and [Report of Branch Membership](#) and submit both to Lions Clubs International.

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 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 [Club Branch Application/Officer Update](#) to International Headquarters
- Submit the [Report of Branch Membership](#) to International Headquarters, or update members using an online reporting system (online reporting is for existing branches only)
- Process membership applications and see that each application is properly approved and reported to International Headquarters
- Help develop a membership 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

Detailed information on hosting informational and organizational meetings can be found in the [New Club Development Guide](#).

Club Branch Name

Club branches must follow the club name guidelines for new Lions clubs, and automatically receives the moniker “Club Branch”. The branch must be known by the actual name of the “municipality” or its equivalent governmental subdivision in which it is located. Since branches are often located in the same “municipality” as their parent club, a “distinguishing designation” must be given to the branch name. If the club becomes a fully chartered club, the branch will retain its club name and the moniker “Club Branch” will be replaced with “Lions Club.”

Refer to the Lions Clubs International [Board Policy Manual](#) for more information.

- Submit branch supply orders to International Headquarters
- Update club officers with Lions Clubs International using the [Club Branch Application/Officer Update](#)

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. Initial branch officers serve until the close of the first fiscal year, and may serve through the second fiscal year if re-elected. The fiscal year for Lions Clubs International and all clubs is July 1 to June 30. 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 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
- Regularly communicate with the parent club
- Establish a plan for the year *
- Form committees to support branch operations *
- Issue calls for all meetings
- Plan and select community service activities **

* See the [Club Officers Manual](#) for more information.

** Consider using the [Community Needs Assessment](#).

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 [Report of Branch Membership](#)
- Use the [Club Branch Application/Officer Update](#)

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 newsletter
- Respond to inquiries and requests made to the branch

Club Branch Treasurer

- Create and manage branch accounts and budgets
- Record payments and deposits for the branch
- Prepare the *Monthly Financial Report* and submit it to the parent club
- Receive dues money from the branch secretary
- Pay branch bills
- Submit international, multiple district and district dues to the parent club treasurer and deposit club branch dues into the branch administrative account

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\$35. 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.

Branch members pay international, district and multiple district dues, along with branch club dues. A branch may set club dues which are different than those of the parent club. International, district and multiple district dues are given to the parent club treasurer and branch club dues are deposited into the club branch administrative account.

Discounts are available for qualifying family units, students, current or former Leos and young adults.

Adding a New Member

When adding a new member to the club branch, the [Membership Application](#) should be submitted for approval by the parent club's board of directors. The parent club then either submits the [Report of Branch Membership](#) with the *Monthly Membership Report* or enters the member online using My LCI.

New Member Kits are available from the Club Supplies Department and should be ordered by the parent club secretary for each new branch member.

Membership Changes

When dropping a member or updating membership information, fill out the [Report of Branch Membership](#) and submit to the parent club secretary.

When completing the [Membership Application](#) for a branch member, be sure to include member sponsor.

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 Branch Members to My LCI

Once the [Club Branch Application/Officer Update](#) 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 My LCI when adding members. If My LCI is used, the [Report of Branch Membership](#) does not need to be submitted to International Headquarters.

U.S. Club Branch Employer Identification Number (EIN)

U.S. club branches have two options for obtaining an EIN in order to open a bank account:

- 1. Use the EIN number of the parent club.** The club branch, with the permission of the parent club, can use the EIN number of the parent club to open a bank account. In this case, the parent club would be responsible for reporting the annual income of the branch to the IRS on its taxes. Although the branch will still have control over its own bank account, the all tax statements/information must be provided to the parent club.
- 2. Apply for a new EIN number.** If a club branch chooses to apply for their own EIN, the branch must file a 990-N, 990-EZ or 990 annually. Apply for an EIN online at www.irs.gov/charities. For additional information on tax filings please visit the [Legal Resources page](#).

If your branch has additional questions about using or obtaining an EIN number, please email legal@lionsclubs.org

Branch Operations

Meetings

Lions clubs are encouraged to meet at least twice a month, and club branches are encouraged to do the same. 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](#) 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. 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.

Communications

Each branch have its own method of communication to it's members. Consider a newsletter, Facebook page or blog. Because the branch secretary is often one of the most informed branch members, he or she is typically given the added responsibility of communicating.

Recruiting & Membership Satisfaction

A branch must have active members to effectively serve the community. If possible, designate a membership chairperson and establish a membership committee. Recruiting for a club branch is very similar to recruiting for a traditional club. The [Just Ask! New Member Recruiting Guide](#) outlines a four step process for membership development and is a great resource for clubs looking to recruit branch members.

You can also consult your branch liaison and parent club officers for recruiting ideas. You can also use the [Club Branch Brochure](#) to explain to potential members what the purpose of a club branch is, or use the [Club Brochure Template](#) to customize a brochure specifically for your club.

Once the members join your branch, the [Membership Satisfaction Guide](#) will help ensure your members are getting the experience they expect from 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.

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 club raffles, increased meal costs, club fines and club auctions.
2. **Activities Budget:** The activities budget finances the branch's activities and projects. Its income should come from special fundraising projects organized by the branch in the community.

Club branches may open their own accounts, and may choose to give or not to give authorization to the parent club. Either way, the branch should provide the parent club with the *Monthly Branch Financial Report* so the parent club can continue to give support and guidance to the branch.

Fundraising

Money earned fundraising must 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

To order Lions Clubs International branded merchandise, club supplies and awards, browse LCI's [online store](#). 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 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. Complete the [Club Branch Conversion Form](#), signed by the parent club secretary, and the [Lions Club Charter Application](#) to waive the charter transfer fee and signal to Lions Clubs International that the branch has closed.

Any money remaining in a club branch's accounts when the branch converts into a chartered club shall be transferred to the accounts of the newly chartered Lions club.

Dissolving a Branch

A branch may be dissolved by a majority vote of the entire membership of the parent club, including branch members. 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 announcing the club branch has dissolved.

Any money remaining in a club branch's accounts when the branch dissolves shall be transferred into the parent club's relative account to be used in the branch community.



Club Branch Resources

Lions Clubs International has many resources available to support your club branch. Contact the Membership and New Club Operations Department at membersops@lionsclubs.org to order, or type

the name of the publication into the search box on the LCI website to download.

Club Branch Kit

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

Other Resources

- [Charter Night Planning Guide](#) (TK-26)
- [Club Brochure Template](#) (MK-20A)
- [Community Needs Assessment](#) (MK-9)
- [Guide to New Club Formation](#) (TK-1)
- [Just Ask! Recruiting Guide](#) (ME-300)



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