

# Leo Club Officer Training

## Course Topics

- [Introduction](#)
- [Leo Club Officer Roles](#)
- [Leo Club Administrative Operations](#)
- [Leo Club Resources](#)
- [Additional Leadership Opportunities](#)
- [Course Summary](#)
- [Contact](#)
- [Resources](#)

## Introduction

Welcome to the Leo Club Officer Training elearning course.

Though you might be familiar with the varied roles and responsibilities within your club, this course will further add to the skills and knowledge you need to support those you are leading.

This course will focus on club officer roles, club administrative operations and resources, and should take about 40 minutes to complete.

## Objectives

By the end of this course, you will be able to:

- Explain the roles and responsibilities of your position
- Describe the administrative operations of your club
- Locate the Leo Club Program Resources developed by Lions Clubs International

[\[RETRUN TO COURSE TOPICS\]](#)

## Leo Club Officer Roles

Leo club officers are the elected officials of the club. Generally speaking, the club officers are made up of the:

- Club president
- Club vice-president
- Club secretary
- Club treasurer

The Leo club advisor will also play a key leadership role in the Leo club by offering guidance.

All of the four elected club officers, along with three elected Leo members in good standing, make up the club's board of directors.

## Club Officer Positions

Following is a description of each of the elected club officer roles. Continue for more information about each of the roles.

### Leo Club Secretary

The club secretary, elected by fellow club members, is a Leo who keeps track of club records and meeting minutes. The secretary maintains records of officers, committee appointments, members, attendance and service activities.

Secretary Responsibilities:

Leo club secretaries are also responsible for reporting Leo club officers and members in MyLCI and club service activities in MyLion®.

These tools are accessed through their Lion account and reporting can be viewed by the sponsoring Lions club.

Once club members are reported, they can then have a Lion account which provides access to more information and resources such as LEARN. You will have the opportunity to learn more about using MyLion® later in this course.

### Leo Club President

The president is a Leo elected by fellow club members to manage club and board meetings.

Club presidents set goals for their clubs and motivate their members to participate in projects. They also advise other club officers on their responsibilities and facilitate decision-making processes.

#### President Responsibilities:

Working with the club secretary, the president submits timely membership and service reports to Lions International through MyLion® and MyLCI, which can be accessed by creating a Lion Account.

#### President Goals:

A Leo club president should set club goals, with the input of the club, at the beginning of the year for recruiting new members, service and supporting the transition of Leos into Lions. Setting goals helps communicate to the members and community what your club's focus is for the year and helps measure your success.

You will find resources at the end of this course, including a sample action plan template for setting club goals. To better develop your knowledge on goal setting, consider taking the Goal Setting course in the Lions Learning Center – a screen reader version of the course is also available.

#### Resources for the President:

A Leo club president's first resource is their Leo club advisor. If the club is school-based, a teacher, counselor or school administrator may act as a faculty advisor as well. Leo club presidents can also reach out to other active Lions or past Leo club leaders for guidance. By using these resources, presidents can enhance their own leadership skills while also helping develop their club members into a successful team.

## Leo Club Treasurer

The treasurer, elected by fellow club members, is a Leo who manages and keeps accurate records of the club's income and expenses.

#### Treasurer Responsibilities:

When it comes to club finances, club money should be in one of two accounts — the administrative account and the activity account — which must be kept separate.

#### Resources for the Treasurer:

The club treasurer role comes with great responsibility. Later in the course, you will learn more about your roles and responsibilities, as well as resources that will support you in your new role.

## Leo Club Vice President

The vice president, elected by fellow club members, is a Leo who assists the president throughout the year and is responsible for identifying leadership development opportunities.

Should the club president be unable to complete the term, the vice president may assume the president's duties as well.

Vice President Responsibilities:

It is key for the vice president to ensure that training for members is identified and encouraged.

Vice presidents should find opportunities for their club members to participate in leadership training offered through Lions International as well as other programs.

Resources for the Vice President:

LEARN and the Lions Learning Center include information about international and local training events and direct access to elearning courses in leadership and club management. Reported Leos can access the Lions Learning Center using their Lion Account. Courses like this one can be taken on a computer, tablet or phone and are available in all official Lions' languages.

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## Leo Club Administrative Operations

The administrative operations of a Leo club include a number of key responsibilities. Each club officer will play an administrative role in one or more of the tasks listed below, which you will learn more about in the upcoming section.

- Leo club meetings
- Membership and officer reporting
- Service reporting
- Club officer elections/new member inductions
- Club funds and fees

## Leo Club Meetings

Scheduling Meetings:

Leo club meetings are to be held at a consistent time and convenient location, as agreed upon by club members, and set forth by club by-laws.

Clubs can make the choice whether to meet in person, virtually, or a blend of both. Consider what works best for the club members.

#### Club Meeting Responsibilities:

Each club officer, including the Leo Club Advisor, has responsibilities in each club meeting.

#### The Leo club president:

- consults with the board of directors for the club, and identifies appropriate agenda items before each meeting
- calls the meeting to order
- establishes the positive tone for the meeting and ensures a welcoming environment
- facilitates the meeting according to the established agenda
- ensures announcements and decisions are made according to the club's constitution and by-laws and Lions Clubs International board policy

#### The Leo club vice president:

- supports the president in the smooth facilitation of meetings according to the agenda
- reports to attendees the status of any projects or tasks that have been assigned
- conducts the meetings in the event the president is not available, and so must be familiar with the current and proposed projects and initiatives of the club

#### The Leo club secretary:

- reviews the minutes of the past meeting and prepares the agendas in advance of the meeting at the direction of the president
- provides information about changes in club members including new and departing members

#### The Leo club treasurer:

- collects any donations, dues, or fines that may be submitted during the meeting
- keeps accurate financial records
- provides updates on the club finances

#### The Leo club advisor:

- offers support if necessary during the meetings
- should be present at all Leo club meetings, or ensure a designated representative of the sponsoring Lions club is available as determined in the Leo club's bylaws

## Officer and Member Reporting

Each year, the sponsoring Lions club president or secretary must report a Leo club advisor online at MyLCI or through the Leo-72 report form.

Once the Leo club president and secretary have been reported by the Leo club advisor, they can then log into their Lion account and view MyLCI and MyLion® to report club members, other officers, access member resources and submit service activity reports.

For more information, please review the “Reporting Matters” document in the at the end of the course.

## Leo Club Advisor and Reporting

Maintaining official member records (reporting) is one of the key responsibilities of the Leo club advisor. Reporting ensures all Leo club officers and members are updated, and that they receive regular communications and program updates.

When a new Leo member is added to MyLCI, the advisor can download a Leo membership card and membership certificate for the new member.

## Member Reporting Access in MyLCI

It is important to be familiar with what roles have access to the MyLCI membership reporting tools and who can do the reporting. To learn about each role’s MyLCI access, continue reading.

**Leo Club President:** Leo club presidents can report members for their own clubs.

**Leo Club Secretary:** Leo club secretaries can report members for their own clubs.

**Leo Club Advisor:** Leo club advisors can report members for their own Leo clubs.

**Sponsoring Lions Club President:** The sponsoring Lions club president can report Leo club advisors and members for the Leo club that their Lions club sponsors.

**Sponsoring Lions Club Secretary:** Sponsoring Lions club secretaries can report Leo club advisors and members for Leo club that the Lions club sponsors.

## The Importance of Service Reporting in MyLion®

Leos use MyLion® to report both upcoming and past service projects.

All Leos with a member ID number from Lions Clubs International have access to a MyLion® account.

Any member can create a service project for their club, but only Leo club advisors, presidents and secretaries can approve the projects.

Leos will want to report their club's service for the following reasons:

Reporting:

- Demonstrates the impact of your club
- Helps Lions Clubs International measure the global growth and impact of Leos around the world
- Establishes Leo members' and clubs' eligibility for awards
- Establishes a record of service activities for future club leaders

### MyLion Service Reporting Roles-Service Reporting Access

It is also important to be familiar with what roles have access to reporting service in MyLion®. To learn about MyLion® access, continue reading.

**Club Level:** Club presidents, secretaries and Leo club advisors have access for the club to which they are assigned.

**District Level:** District Leo chairpersons, presidents and secretaries have access on behalf of the Leo district.

**Multiple District Level:** Multiple district Leo chairpersons, presidents and secretaries have access on behalf of the Leo multiple district.

**Service Reporting Access:**

When reporting Leo club service in MyLion®, choose the Leo club name from the drop down menu under "Activity Details".

Leos will only see the name of their club.

In the case of Leo club advisors, it is critical they choose the name of the Leo club for which they are reporting the service.

An additional note about choosing the Leo Club name in MyLion®: Make sure to choose the name of the club for which you are reporting service. This can be done from the drop down menu.

## Leo Club Officer Elections & Member Induction

Leo club elections take place during the fourth quarter of each fiscal year. Elected individuals take office on July 1.

School-based clubs may choose to hold elections at a different time of the year, aligned to school policy and practices.

Leo club advisors are expected to have a supervisory role in Leo club elections.

Voting protocol:

- Nominations of candidates should be made in writing prior to election or announced from the floor.
- Voting is conducted by secret ballot.
- Elected candidates must receive majority of votes by members present and in good standing.

For additional information regarding voting protocols, please refer to Chapter XXII of the Lions International Board Policy Manual located at this [website](#).

## Leo Club Induction

A Leo's journey begins with their induction into the club. For new officers, formal installation into their new role plays a pivotal part in the development of the club and their personal growth. Leo club advisors should supervise the induction of new members and annual installation of club officers, overseeing the transfer of responsibilities between outgoing and incoming officers.

For more detail, please review the Leo Installation and New Member Initiation Guide, accessible by reviewing the resources and links at the end of this course.

## Leo Club Funds and Fees

International headquarters and local Lions administration assess fees on clubs to support the ongoing growth and development of the Leo Club Program.



These fees support the development of resources for Leos, such as the Leo Leadership Grant Program, MyLCI, the Leo Facebook page, a refreshed Leo brand and promotional materials, and many more. Following are descriptions of various fees:

- **The Charter Fee:** US\$100 is billed directly to the sponsoring Lions club at the time of a new Leo club's organization. Because Leos are considered a service activity of a Lions club, sponsoring Lions clubs may remit payment for Leo club sponsorship using their administrative or activity account. The fee covers charter processing and the charter kits, which includes a certificate of organization (charter), Leo club officers' kit, Leo club sponsor kit and Leo lapel pins for each original Leo club member.
- **Annual Leo Levy:** A US\$100 yearly fee is levied for each active Leo club. The Lions clubs are billed an annual Leo club sponsor levy of US\$100 each July to cover Leo Club Program materials, mailings, club record maintenance, communications, awards, program resources and insurance.
- **Club Fees:** While Lions International does not collect dues from Leos, individual Leo clubs may collect dues or admission fees to offset costs related to the annual Leo levy or other administrative expenses. The Leo club dues are determined by the individual club and should be specified in the club constitution and bylaws.
- **Club Membership Fees:** Any dues or assessments on Leo club membership should be nominal and should only be for the purpose of covering the club's administrative expenses. Generally speaking, funds for activities and projects undertaken by Leo clubs should not be collected through member dues or fees. Any Leo club member who has failed to pay their member dues to the club at the time of a vote at any regular or special meeting will forfeit the privilege of voting and be considered not in good standing until the dues are paid.
- **District Fees:** If a club falls within a Leo district or Leo multiple district, they may assess additional club or member dues.
- **Additional Notes:** If a Leo club is no longer active, the Leo Club Termination Form (Leo-86) must be received by the Leo Club Program Department by October 31 to receive a credit of US\$100 for the current year's Leo levy only.

## Managing Funds

Leo clubs can use the existing bank accounts of their sponsoring Lions club, or they can open their own bank accounts under the supervision of the sponsoring Lions club.

If a Leo club chooses to open a bank account, two signors are required – the Leo club secretary or treasurer and a designee of the sponsoring Lions club. The Leo who is granted the authority to oversee this bank account should be able to open/co-sign a bank account and execute checks in accordance with local laws.

### Leo Administrative and Activity Funds

Details for managing bank accounts should be spelled out in the Leo club's constitution and by-laws.

It is important that the Leo club has two distinct funds to separate the administrative activity from the public or fundraising account. Read about each type of fund below.

- **Administrative Funds:** Administrative funds are accrued from Leo club admission fees and annual dues from club members. Administrative funds can be used for both administrative and public projects. These funds should be used to support club activities and pay local dues, if applicable.
- **Activity/Fundraising Funds:** The activity/ fundraising account contains the funds raised from public fundraising projects. These funds must be used for charitable purposes, such as supporting the club's community service activities.
- **Additional Tips:** With the consent of the board of directors, funds may be transferred from the administrative account to the activity account. Leo clubs that have bank accounts should specifically state how the account will be handled and maintained in the club's constitution and bylaws. Interest collected from either of the accounts can be used for both public projects and administrative expenses.

## Knowledge Check

Before you continue, test your knowledge on three of the key items you have learned.

Knowledge Check 1: This is a true or false question.

Question: Service should be reported through MyLCI?

- True
- False

The correct answer is Service should be reported through MyLion®.

Knowledge Check 2: This is a choose one question – you will have three options.

Question: What chapter of Board Policy should you review to learn more about voting protocols?

Possible responses:

- Chapter X
- Chapter XXII
- Chapter XIV

The correct answer is Chapter XXII of the Lions International Board Policy Manual is where you can learn more about voting protocols.

Knowledge Check 3: This is a choose one question.

Question: What are a Leo club president's reporting privilege in MyLCI?

Possible responses:

- Can report for their own club.
- Can report the club they sponsor.
- This role cannot report.

The correct answer is that a club president can report for their own club.

## Leo Club Operations Summary

In this section, you have reviewed the details of several Leo club operations.

- Leo club meetings
- Membership and officer reporting
- Service reporting
- Club officer elections/new member inductions
- Club funds and fees

The information learned here will support you in your club officer role. In the next section you will learn about the available resources to further support your success.

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## Leo Club Resources

Leo club officers are not only the leaders, they are also resources of knowledge for the Leos in their club.

Where do Leo club officers gather this knowledge? Their own experience and the experiences of others is one place.

There are also banks of resources and knowledge online, and the next section will direct you to many important resources for Leo clubs.

This section will describe and provide access or links to the resources your team and club will need to succeed. The following will be covered:

- General Resources
- Important dates
- Leo homepage
- Leo awards
- Leo news
- Additional online resources
- Marketing and recruitment resources

Please note, there is a section at the end of this document that has links for the resources you will read about along with additional links that may be helpful.

### General Resources for Leo Clubs

- Leo Home Page: The first place all Leo club officers and advisors should visit is the Leo page at: <http://www.lionsclubs.org/leos>. This page provides important program information, including information about grants, key program resources, marketing tools and leadership opportunities.
- Important Dates: Each year, special events take place to celebrate Leos and recognize their contribution to the humanitarian work of Lions Clubs International. Following is more detail on some of these events.
  - October: October is Membership Growth Month. Each October, Leos host membership drives and may receive individual or club awards for inducting more young people into the club.

- December: On December 5, the chartering of the very first Leo club in 1957 is commemorated. Known as International Leo Day, December 5 is a day of celebration and promotion of the Leo Club Program.
- April: April is Leo Club Awareness Month. Awareness month calls on Leos and Lions to spread the word of Leo clubs and the great services that they provide to their communities and the leadership opportunities available to young people through this program.
- June: In the last week of June, at the end of the fiscal year, Leos gather at the international convention, where they participate in events, seminars, celebrations, and service activities.

## Leo Awards

Lions International offers a variety of awards and recognition for Leos and Lions involved in the Leo Club Program.

Some awards are meant for individual Leos and Lions, while others are designed to recognize Leo clubs, districts, or multiple districts. For more detailed information, including a full listing of awards and application forms, visit the Leo Awards and Recognitions webpage [here](#).

Below are a few examples of Leo awards:

- Individual – Leo of the Year
- Club – Club Excellence Award; Serving Together Award; Leo Club Pride Award
- District/Multiple District – Leo Multiple District/ District President Achievement Awards

## International Leo Day Video Contest

Each year, Leo clubs around the world have an opportunity to share their successes globally through the submission of a video that celebrates their club's achievements. Learn more at International Leo Day Video contest website [here](#).

## Leo News

All Leo club officers, Leo club members, Leo club advisors and district/multiple district Leo chairpersons who have been reported for the current fiscal year and provided a unique email address will automatically receive the Leo eNews from Lions International.

The eNews is sent quarterly, from [leo@lionsclubs.org](mailto:leo@lionsclubs.org). It provides important information about upcoming deadlines, events and resources for Leos and Lions involved in the Leo Club Program.

Officers that have reported their contact details to Lions International and are not receiving the Leo eNews should contact the Leo Club Program Department to inquire.

## Marketing and Promotional Resources

Marketing your club allows others to become familiar with the great work and service your club is accomplishing.

Marketing your club is also a great tool for recruitment.

In this section you will learn of a few of the resources to help guide your decisions with marketing and recruitment.

Many marketing and promotional resources can be accessed online. Read through the numbers 1, 2, and 3 for an overview of each one.

1. Lions International has created resources to help market your Leo club including customizable brochures, posters, and social media tools. These items can be found on the Leo landing page and in the Leo items included in the Resource Center on the website. Brochures, posters and guides on Leos can be downloaded from the website. Lions can also place orders to receive printed materials. Additional social media kits that are ready to post for Leos and other Lions International initiatives can be found [here](#).
2. The Leo Club Publication Form has the full list of printed resources Lions International offers. Leo club advisors can place an order by submitting a Leo Club Publication Form to [leo@lionsclubs.org](mailto:leo@lionsclubs.org). Resources are free of charge, but the Lions club, district or multiple district must pay shipping.
3. The Leo Facebook page provides Lions and Leos with quick access to the latest news and developments within the Leo Club Program. The Facebook page also serves as a platform for Leos around the world to connect and share ideas on topics such as effective community service projects or being a good leader. This is a great way to stay informed of the latest news and events related to the Leo Club Program. Follow the page at [www.facebook.com/leoclubs](http://www.facebook.com/leoclubs).

## Leo Club Resources Summary

In this section, you have reviewed the details of several Leo club resources.

- General resources
- Marketing and recruitment resources

A list of the resources described in this section as well as links to many of these items is available at the end of this document.

[\[RETRUN TO COURSE TOPICS\]](#)

## Additional Leadership Opportunities

Your leadership does not have to end with your term. There are many opportunities for club officers to pursue leadership roles at the district, multiple district, and constitutional area levels.

These roles utilize the experience obtained through club leadership to support and improve the Leo Program in your area and around the world. For more information on each, use the dial below.

- Leo or Leo-Lion Cabinet/Council Liaisons: These liaisons help improve the connection between Leos and Lions at the district and the multiple district level by using their experience in the Leo Club Program to serve as a voice for the Leos within the Lions structure. They promote the program and encourage joint training and service between Leos and Lions. To learn more about these positions, refer to Chapter VII of the Board Policy Manual [here](#).
- Leo District and Multiple District Officer Roles: Many areas offer Leos an opportunity to organize their own Leo Districts and Leo Multiple Districts. Leo officers, who have served at the club level, can use their skills to support Leos throughout their district or multiple district by coordinating training and service activities. To find out more about the creation and operations of Leo Districts and Multiple Districts review Board Policy Chapter XXII [here](#).
- Leo Club Program Advisory Panel: The Leo Club Program Advisory Panel is an advisory board of 32 Leos and Lions from each constitutional area that are appointed by the International Board of Directors. The group meets monthly to provide feedback to Lions International and collaborate with other panel members to improve the Leo Club Program. The panel works on three committees that focus on Leo recruitment, Leo membership experience and the Leo to Lion transition. The group also serves as a resource to Leos and Lions worldwide. Each committee has created PowerPoints and guides that are available on the website, located [here](#). Applications are due each year on August 15.

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## Course Summary

In this course, you have read considerable information regarding your role as a Leo club officer. You will find additional information on the Leo landing page

If you are interested in learning more about the transition from Leo to Leo-Lion, please take the “Beyond Leos: Continuing The Service Journey” course in the Lions Learning Center.

## Contact

To receive credit for completing this course in the Lions Learning Center, or if you have problems navigating through this online module, please contact [learning@lionsclubs.org](mailto:learning@lionsclubs.org).

[\[RETRUN TO COURSE TOPICS\]](#)

## Resources

- General: <https://www.lionsclubs.org/en>
- Leo Home: <https://www.lionsclubs.org/en/discover-our-clubs/about-leos>
- Leo Grant Program: <https://www.lionsclubs.org/en/start-our-approach/grant-types/leo-grants>
- Leo Awards and Recognitions: <https://www.lionsclubs.org/en/resources-for-members/resource-center/leo-awards-and-recognitions>
- Leo and Lions Logos and Emblems: <https://www.lionsclubs.org/en/resources-for-members/resource-center/logos-and-emblems>
- Marketing and Promotional Resources: <https://www.lionsclubs.org/en/discover-our-clubs/about-leos>
- Leo Page on Lions Shop: <https://lionsclubsinternational.myshopify.com/collections/leos>
- Leo Facebook Page: <https://www.facebook.com/leoclubs>
- LEARN: <https://www.lionsclubs.org/en/resources-for-members/resource-center/leadership-development>
- Leo Constitutional Area Events/Lions Clubs International Convention: <https://www.lionsclubs.org/en/resources-for-members/lions-events-calendar>
- Action Plan Template (automatic download): <https://www.lionsclubs.org/resources/116277075>
- Leo Installation and New Member Induction Guide (automatic download): <https://www.lionsclubs.org/resources/120142828>