

Lieutenant Governor-Elect Workbook



COPYRIGHT CONSIDERATIONS: Optimist International reserves all rights to all materials contained in this manual. Permission to photocopy, distribute and use these materials as educational supplements in Club and District training is hereby granted to all Optimist International Club Members. No other permission for any other reason is granted without prior written permission of the copyright owner.

Lieutenant Governor-Elect Workbook

TABLE OF CONTENTS

The Critical Role of the Lieutenant Governor	3
Building a Relationship with Your Team	4
Group Discussion on Challenges Related to Team Building	4
Organizing Your Zone Meetings	4
Visiting Your Clubs	5
Installations and Inductions	5
You Aren't Finished Until the Paperwork is Done	6
Lieutenant Governor Recognition	6
optimistleaders.org – Answers Are Just a Click Away	7
Goal Setting	7

ATTACHMENTS

Mission, Vision and Purposes of Optimist International	A-1
Honor Club Tracking Report	A-2
Sample Zone Meeting Agendas	A-3
Zone Meeting Report	A-4
Zone District Report	A-5
Lieutenant Governor Checklist	A-6

Lieutenant Governor-Elect Workbook

Governor-Elect Address

The Critical Role of the Lieutenant Governor

The Lieutenant Governor is an **administrative arm of the District**. Your job is to help Clubs succeed by facilitating communication between the District and Club leadership and to be a resource to Clubs.

List the Administrative and Managerial Roles of the Lieutenant Governor:

Team Building Exercise

List the names of your fellow Lieutenant Governors-Elect you will be working with in the coming year.

Lieutenant Governor-Elect Workbook

Building a Relationship with Your Team

Why do you need to build relationships in your Zone?

List things you can do to build strong relationships with your Presidents, Secretaries, Treasurers and Members:

How does your Zone benefit?

How do you benefit?

Challenges Related to Team Building

How will you, as Lieutenant Governor, react if a President fails to live up to your expectations?

You call a Club President to discuss his/her goals and setting up the Honor Club Tracking Form meeting. He says "the Board Members don't have time to meet and he is happy with his Club as it is and he doesn't need any outside help." What is my response?

How will I deal with volunteers such as Club Presidents who have negative attitudes?

How do you deal with Clubs who don't attend Zone Meetings?

Zone Meetings

The **purpose** of the Zone meeting is to promote organizational goals, build camaraderie and share ideas among Club leaders.

Zone meetings are conducted at least quarterly throughout the year. Generally all Club Officers and Board members are invited. However, you and your Zone would benefit greatly if you also extend the invite out to all Club members in the Zone. It is a good idea to conduct meetings three to four weeks before District conferences.

Come up with innovative ideas to meet the needs of your Zone. For example presenting the Membership in your Zone with growth needs by holding a Zone NOW meeting.

Before you begin, write an **objective** for the Zone meeting. What do you want to accomplish?

My first quarter Zone meeting objective:

Sample **Zone meeting agendas** are attached. Review the sample agenda. Think about what your first Zone meeting agenda will look like.

Consider this "successes and challenges" exercise at Zone meetings. Each Club representative has one minute to share a recent project, accomplishment or success. This can build pride in the work that is done. Next, each Club representative can share one "challenge" that faces him or her in the near future. This can be a positive, problem-solving and supportive way to help Clubs with possible solutions to difficult situations. Keep close control of time and do not let discussions ramble.

Also consider inviting a specific District Committee Chair to your Zone meeting to give a presentation or assist you with a promotion.

Lieutenant Governor-Elect Workbook

During the Zone meeting make leaders feel welcome and valued. Recognize the accomplishments of others. Be friendly, supportive and optimistic!

Keep in mind Zones are not legal entities of themselves but an arm of the District.

After the Zone meeting **send in the "Zone Meeting Report."** This is an important function as a liaison between you and your Governor and District Secretary Treasurer.

How can you promote attendance at Zone Meetings?

Visiting Your Clubs

The Lieutenant Governor is expected to visit each Club in the Zone a minimum of two times over the course of the year. There are essential reports that these two visits require be filled out and returned to the District Governor, District Secretary Treasurer and other officers of the District. Visiting your Clubs does not need to be limited to just those two business orientated visits though. You should visit your Clubs as often as necessary to help them and you accomplish your goals.

Why is the Lieutenant Governor required to visit the Clubs?

What would be a reason to visit your Club outside of the CLUB PLANNING FORM visit and the Mid Year visit?

Installing Club Officers and Board Members

A function of the incoming Lieutenant Governor is to install incoming Club officers of the Zone's Clubs. Someone else may do this if the Lieutenant Governor is not available. The Lieutenant Governor has an opportunity to make this first impression on a Club. The Lieutenant Governor should call the incoming President to set up the new officer installation. Installations should be done in front of the whole Club, spouses and partners are often invited to the special meeting. Protocol dictates that the Club pays for the

Lieutenant Governor's meal but do not insist if it is not offered. The purpose of the ceremony is to get commitment from incoming officers toward the Club's success.

What can I do to make the "Club Officer Installation" a special or significant ceremony?

Outline of my opening speech to a Club's members:

Inducting New Members

A function of the Lieutenant Governor is to induct new members into their Zone's Clubs. Make sure your Club President's are aware of this opportunity. Encourage them to invite you out to a meeting to induct their new members in a special ceremony. You are an official representative of the District and this should be an event in the new Member's life that should be looked back upon fondly.

What can you do to make a Member's Induction a special moment?

Lieutenant Governor-Elect Workbook

Reports to Submit

Briefly review other reports you will submit, what they represent and the dates they are due. These include Honor Club Tracking Form (November 15), **Zone Meeting Reports** (quarterly), **Club Visitation Reports** (mid year) and **Annual Club Reviews** (end of year).

The Lieutenant Governor's role is to assist Clubs in sending in proper reports on time with accurate Club names and numbers (include new club building reports).

The Honor Club Tracking Form is used as a tool to help a Club plan the upcoming year and as a way to stay on track to meet the Honor Club requirements. It should be completed at a meeting between the incoming Lieutenant Governor and the incoming Club Board of Directors. The purpose is to review where the Club is now and what it hopes to accomplish in the coming year.

What is the purpose of the Honor Club Planning form?

Who should attend the Honor Club Tracking Form?

This conference is arranged with the Club President in advance and should be conducted prior to October 1st. The conference is designed so the form itself will act as a discussion guide.

- ◆ Use the District name, Zone number, official Club name and Club number on all correspondence. The Board Members should also know this information.
- ◆ By asking the questions on the form, it should become evident what the Club needs to do to get ready for the coming year.
- ◆ The names of the Club Chairs represent the volunteers who will make the Club work effectively.
- ◆ Setting goals is a section you might want to discuss with the President in advance. The role of the Lieutenant Governor is to listen and encourage.
- ◆ Discussing the items on the form requires the Lieutenant Governor to use experience, common sense, supportive encouragement, resources and a sense of optimism to empower the Club to operate effectively.

Finally, **send in the** form with appropriate signatures.

Name other reports required from the Lieutenant Governor over the course of the year:

New Club Building

Building a new Club in a community or area that isn't already being serviced by an Optimist Club is the best Community Service Project any Club could ever perform. As Lieutenant Governor you are in a unique position to inspire the building of a new Optimist Club in your Zone. It only takes two people to get a new Club started.

Why would you want to build a new Club?

Review the material in the New Club Building Handbook. Consider your role in the formation of a new Club.

- Getting started
- Planning the project
- Building the Club
- The Organizational Meeting
- The Follow-Up Program

Optimist International Recognition

Review the *Recognition Information* for the coming year. The Optimist Recognition Program is designed to recognize people who achieve goals, which result in a better Optimist Club and service to youth and community.

- ◆ Recognition represents a proven "road map" toward success
- ◆ Setting additional personal goals are also encouraged
- ◆ The real value of recognition is the time and effort put forward
- ◆ Personal integrity in meeting requirements is assumed

Review the award for **Distinguished Lieutenant Governor** as explained in the *Recognition Information*.

Review the awards available to Clubs such as the **Honor Club** and **Distinguished President** recognition to encourage the Clubs.

Lieutenant Governor-Elect Workbook

Review the requirements for the “**Bringing Out the Best**” Club recognition.

Review the **Presidential Incentives** as they change each year.

District Recognition:

Districts can develop their own recognition programs. These would normally be established by your Governor. Ensure you attend your District training classes and have your Presidents, Secretaries and Treasurers do the same with their respective training sessions. Everyone will collectively do better at achieving their goals and serving their youth and communities by being educated fully on the potential that’s available to them.

Resources

Lieutenant Governor **resources** are the District Governor, District Committees and the Optimist International staff. As well as the Optimist websites and the information Optimist International sends out via mail/email. In addition:

- ◆ Take a few minutes to see what information can be found on the websites: www.optimist.org and www.optimistleaders.org.
- ◆ *Recognition Information* - important goal oriented recognition that promotes success by Clubs and Districts.
- ◆ *Optimist International and Club Bylaws* - a description of the administrative structure and function.
- ◆ Other materials on membership, new club building, programs, JOI Clubs, service projects, fund raising and more.

Goals Setting

Setting goals is important for personal accomplishment. Our Recognition program does reflect worthwhile goals. Achievement reflects positively on the job the Lieutenant Governor will do.

Goals

How many new Clubs will be added to my Zone? _____

Where?

Who will help me?

How many members are in my Zone now? _____

How many will be added next year? _____

How many might I lose to attrition? _____

What will be the net gain? _____

How many Honor Clubs will I have next year? _____

What would I like to accomplish in my Zone next year?

How can I get members of my Clubs to adopt and work for the goals of my District and of Optimist International?

“A goal without a plan is only a wish”

~ Antoine de Saint-Exupery

Questions and Answers:

Lieutenant Governor-Elect Workbook



OPTIMIST
INTERNATIONAL

Friend of Youth

Optimist International
4494 Lindell Boulevard
St. Louis MO 63108
800-500-8130 or 314-371-6000
Fax: 314-371-6006
www.optimist.org
www.optimistleaders.org