

The Ohio Plan

for the

Second Century of Lionism



- **A Structured Method for Recruiting New Lions.**
- **This Plan Works Every Time it is Used, if the Procedures are Carefully Followed.**

Summary:

This document provides a turnkey, step-by-step procedure that can be used by Lion Clubs to recruit new members. The Plan is definitive, highly detailed and targets individuals and couples that have a good chance of becoming excellent Lions.

In short, follow the plan **carefully** and you will be successful. There is, however, little room for creativity. We do not recommend anyone "doing their own thing!"

The Membership Chairman and his/her assistants will normally require a more detailed explanation of the Plan. The following information is available at:
www.ohiolions.org/ohio_plan.htm

A number of supporting documents and forms that are required to run the program: letters, time schedules, meeting agendas, advertising material, new member package, etc.

KEY FACTORS for a Successful New Member Night

General Guidelines:

- Always remember the old saying “*You only get one chance to make a good First Impression.*” Think about this every time you are about to make a decision. Prospective members are your guests, and you must show them every possible consideration! Put yourself in their shoes and ask how you would respond to any and all situations.
- Recruiting new members cannot be undertaken in a haphazard manner. Recruiting is a **PROJECT**, just like fund raising or community service activities. There must be a Project Chairman, assistants, and really good planning.
- Many Lions are reluctant to recommend friends or associates as new Lions. This is usually for fear of embarrassment or failure. However, you can normally get the support of these people by assuring them they will not have to personally make any approaches or phone calls.
- There are numerous places where the text reads “the committee” These are critical tasks that are best performed by the Membership Committee.

Before the Meeting: 4 to 6 weeks before the New Member Event, which is best done in March or September.

GATHER NAMES:

- Each member submits names of potential members at a meeting.
- Suggested categories are listed on the LCI Membership Wheel (RS).
- A really “hot category” are couples whose last child just graduated from high school. Many of these people have been active in sports, band boosters and other activities. They are accustomed to attending meetings during the week and will now have some empty evenings. The Lions can help them fill this void.
- Review the suggested names with your members. Reconsider anyone who might be controversial or could cause disunity. This process must be performed “delicately.”
- The Committee fills in any gaps in the addresses and phone numbers.

LETTER OF INTRODUCTION (see addendum page 7):

- The Committee sends the Letter of Introduction to the prospects.
- A club advertising flier may accompany the letter or reference the club website
- There is a sample letter as an addendum on page 7 of this document.
- Make sure the details about time, place, dress code etc are all correct!
- Since the Ohio Plan was written, the move to email and internet has changed the way many folks communicate. But *NOT* for everyone. You need to think about who you are reaching out to in deciding whether to send snail mail or email to your prospective member. The fact that they have an email address does not mean that is the best way to contact them. For many retirees, they have an email address and use the internet regularly – but are still going to appreciate an outreach in a more formal and traditional way. On the other hand, when you ask

your members for names and contact information regarding their prospects, some of them may have only an email address to offer (especially true of people they work with). We suggest that when taking names from your members, you ask them whether they think the individual should be contacted by snail mail or email. See Addendum, page 8, for suggested wording and process for doing the initial outreach by email.

TELEPHONE CALLS (see addendum page 9):

- Call each Prospect about one week after the Letter is mailed to clarify any issues and answer any questions.
- The Committee should make this call, but it is essential that the call be made. If the sponsor wants to make the call allow them to do it.
- It is very important to ask the Prospect to commit to attending the meeting!
- The committee should call again a few days before the meeting and offer to give the Prospect a ride to the meeting or the sponsor may do so.
- You may want to send a reminder post card a week before
- For those that you reached out to via email, an alternative is needed. The whole idea of this step is to make PERSONAL contact with the prospect – something that cannot be done through email. In our experience, if the letter of introduction is sent via email (at a Lion’s suggestion) then that sponsoring Lion WILL need to be the one to reach out to the prospect with a personal conversation or phone call, to follow through (note – as shown in Addendum A, page 8, if you are sending your Letter of Introduction by email, we recommend that you send an open copy of that letter to the sponsoring Lion, so it will come as no surprise to the prospect that they will hear from *that* Lion within a week of the time the email arrives).

Once the prospect has accepted the invitation to attend your meeting, the further follow up (the “week out reminders,” etc.) can be done by email from a member of the committee. But the face-to-face contact (or a phone call) from a known person is critical to any outreach you do for folks via email. It is too easy to either ignore or delete emails – don’t give them the chance to ignore or delete *you!*

PLANNING THE MEETING:

- Venue: Best choice is a restaurant with a private room. Public rooms at Libraries, Community Centers, etc. are acceptable if you can serve food and the background noise level is acceptable. If you don’t have to change from your typical meeting venue (that is, if you can hold the meeting where you normally do and still make appropriate arrangements for a quiet place with good seating/lighting/meal options), think long and hard about moving away from that to someplace different (special) for this activity. You are trying to show your recruits who you are and what they can expect if they join you. It may be important to let them see the “real” you.
- Menu: Best choice is a buffet because it is the easier to provide a wide variety of foods, including vegetarian. If using a sit-down meal, pick something simple and light.
- Schedule speakers and their topics. Get agreement on the time limit.
- From start to finish, *the meeting should never exceed an hour and a half and the speaker portion after the meal should not exceed thirty minutes.*

- Decorate the room with Lions flags, banners, scrapbooks, etc.
- Prepare name tags, agenda and New Member Packets. Double check all the information and spelling.

Rehearsal and Preparation

Perhaps the most important strategy for making the Ohio Plan work is to REHEARSE everything in advance. The general meeting before the night of the recruitment event can be given over to talking about what will happen the night of the event. Suggest talking points for the Lions to bring up in their talk with recruits, and give them the names of folks who will be there (if they are confirmed). Ask the person who submitted that name to give a quick rundown on the person and tell something that might be useful in making conversation (e.g., “He is a huge Cleveland Browns fan” or “She is an attorney and has lived in this area all her life”).

Have the people you are planning to have speak rehearse those speeches (see listing of presentations, below). Have them get up in front of the Lions and give their speech. This gives them experience in talking in front of a group, makes sure they stay within the time limit allotted, and (if they *aren't* within the time limit) it gives a chance to suggest what they could cut out of their presentation so that they WILL stay within the time limits.

Review the agenda and the seating arrangements, talk to the Lions about what information will be in the packets that recruits are handed, and make sure that you have a good system worked out for how to dismiss folks to get in line for the buffet so that you don't have people tripping over one another. The rehearsal makes a HUGE difference in insuring the evening runs smoothly.

Have a packet of materials ready for each recruit. Consider a two-pocket folder with materials tucked in on each side, and the potential member's nametag clipped to the front. You want to make sure to include a brochure or flier that is specific to your club, and a membership application. This is your chance to share both some professionally produced materials from LCI that talk about the impact of Lions worldwide and about personal satisfaction. It is also a chance to brag a little about what your club is all about. Consider including copies of recent news articles about your club, or flyers promoting recent or upcoming activities, or even a picture page showing your Lions in action.

The Meeting Format:

GREETING:

- Put a “glad hander” on the door to greet the guests. That first friendly handshake and smile are invaluable.
- Remember, make a ***good first impression***.
- Your members should arrive early and be on their feet moving around the room.
- Everyone should have a name tag.
- Sponsors should be on the lookout for their guests. Each recruit should get individual attention from their personal host. That means that if you get more than one recruit from the same “sponsor” (that is, someone gives you more than one name), you may need to assign hosting duties to someone else. You can sit them at the same table with the person who sponsored them, but you want them to

feel individually welcomed and courted. Ask the sponsor to identify another Lion who would get along well with that recruit.

- NO GUEST CAN BE LEFT STANDING ALONE!

SEATING:

- Encourage the sponsors to sit with their potential members so they can guide them through the proceedings during the evening.
- **MAKE SURE** there are no tables with just guests sitting there!
- Leave **NOTHING** to chance. Number the tables, and give everyone a table assignment (whether or not they are actively hosting a recruit). In considering seat assignments, you want to: (a) make sure that no recruit is separated from their assigned host/sponsor, (b) whenever possible, assure that you have assigned other Lions to sit at the table with the new recruits who will have something in common with them (kids the same age, recently retired, matched by occupation, etc.), and (c) make sure each new recruit has every chance of taking away a good impression of the people they meet. You know who your members are who are likely to either be too shy to speak up and interact comfortably with strangers, or to bend their ear with stories of “the good old days.” Balance those folks, at each table, with at least one of your best recruiters – someone you know is a great listener and good at keeping the conversation going.
- Have agendas, New Member Packets and (perhaps) some of the glossy LCI recruitment literature for each Guest on the tables.

PROGRAM:

- **Gear the program to the potential members.** Aside from a favorable first impression, the factor that will most determine whether a prospect joins your club is how much good you do for your local community!
- President starts the meeting with pledge, invocation, and introduces MC (if it will be different from President). You may wish to consider having the Director of Membership do the honors.
- Everyone knows how to eat, so get to it!
- 1st Speaker. An enthusiastic Lion who can talk about how much good your club does, how strongly your members felt about your efforts and how much fun you have. (5 minutes)
- 2nd & 3rd speakers. Two Project Chairmen; one fund raising and one community service. Tell the guests what you do and why you do it. (5 minutes each)
- Treasurer: Talk about how the club money is spent. You don't need to discuss the administrative vs project funds. Instead, you want the focus on how much money your Club has raised over the last few years, how it has been given away or spent, and how many folks have been helped through the Club's money. (5 minutes)
- Invite a representative from one of your regular philanthropies to be present to accept a check and to thank the Lions for their ONGOING support. You want it to be clear that this check isn't something being given as a one-time donation. This is a cause you support on an ongoing basis. (5 minutes)
- Last, have someone who from your club speak for just a few minutes about “When I Became a Lion” – not the date of their installation, but the moment in time when they looked around and were struck by what they were a part of.
- Close the deal –ask for questions and provide a membership application to each guest attending

Think about the **TONE** of the presentations you make that evening. You want to present a positive image of your club and of your plans for the future. Don't talk about how your membership numbers are down

(if they are!) – talk about what exciting plans you have for expanding your service agenda when you bring in some new members. Don't talk about what you *used to do* (when you had more members), talk about what you **ARE** doing and what you hope to do in the future with their help. You want your recruits to join you, not save you!

After the Meeting:

FOLLOW UP:

- Send follow-up letters to those who joined (**see addendum page 11**), those who attended (**see addendum page 10**), and those that said they would attend but didn't. Send the follow up letters in the same manner you sent the initial outreach letter – whether that be by snail mail or email. If you are sending by email, you can send a copy of the membership application as an attachment for them to download.
- The committee must keep in contact with the Prospects.
- Keep after **Every Prospect** until they either join or definitively tell you “I have no interest.”

CLEANUP:

- Give a big “Atta-Lion” to everyone who helped make the New Member Night a success. Praising your members is always warranted for work well done.
- Make sure your Club starts working on Inducting, Orienting and Involving the new members. If your Club fails to perform these three steps the new members will not remain Lions for very long.
- Keep accurate records of the New Member Night. They have long term value. Setting up a database or spreadsheet is the key to a good records system.

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Addendum

(Sample - Invitation Letter)



Anytown Lions Club
Anytown, Ohio

Date

Dear _____,

At a recent meeting of our Lions Club, your name was recommended for possible membership. To let you know a little bit about us, we are members of the largest service club organization in the world... Lions Clubs International. Our membership is made up of community minded men and women like you who are interested in making our community a better place to live.

Our club was organized in ____ and we have served the community with pride and with the knowledge that we made a difference for the past __ years. You have probably seen us in the community working to raise money for our projects or know of one of the many service activities we complete every year. But do you know that besides the hard work we have lots of fun and fellowship? As a Lion you will make friendships that will last a lifetime.

We are proud of our club and all we do, and we could do more if we had more members like you. We are extending an invitation to you to be our guest for dinner at our NEW MEMBER NIGHT on _____, (date) at ___(place)___ at _____ (time). Following dinner we will spend time explaining in more detail our club service and fund raising activities. We will complete our meeting no later than _____ p.m. Between now and ___(date noted above)___ a Lions Club member will be calling to talk to you about this event. We hope that you will accept our invitation. In the meantime, if you have any questions please feel free to call me or any other Lion that you may know for more information.

Thank you for taking the time to consider Lions, and we look forward to seeing you soon.

Sincerely,

Name

Title, _____ Lions Club

Phone number

(Sample - Electronic Invitation Letter)

If you are going to send your outreach letter by email, we suggest you try this, sent in the BODY of the email. Don't send it in an attachment in order to get it on Letterhead – people are hesitant to open attachments from people they don't know. We also suggest that you put the recommending Lions first name in the subject line of the email.

(Prospective Member),

_____ is a member of the _____ Lions Club, and has suggested that you would be a great addition to our club. **We are reaching out to invite you to come and meet our Lions.** Our membership is made up of community minded men and women like you who are interested in making our community a better place to live.

We are proud of our club and all we do, and we could do more if we had more members like you. **We are extending an invitation to you to be our guest for dinner at our NEW MEMBER NIGHT on (date), at (place), at (time).** Following dinner we will spend some time explaining what we do for our community.

Between now and (date noted above), we will be contacting you to talk about this event. We hope that you will accept our invitation. In the meantime, if you have any questions please feel free to contact me or check out our website at (Website address) or our Facebook page at (Facebook address).

Thank you for taking the time to consider Lions, and we look forward to seeing you soon.

Sincerely,
Name and Title
_____ Lions Club
Phone number
Email Address

(Reminder Call)

Hello (Candidate's Name). This is (Your Name) from the _____ Lions Club. You recently received a letter from our membership chairperson inviting you to our membership meeting on (date) at (time) . at (location) .

I'm just calling to make sure you received the letter. The attire for the evening is casual and we anticipate an evening of good fellowship mixed with an opportunity for you to learn a little bit about Lionism. We promise to have you out of there no later than (time) .

We are required to give the restaurant reservations so we'd like to know how many guests to expect. Can we count on your attendance? Do you need directions or a ride to the restaurant?

Thank you.

Sample - Thank You for Attending Letter
(to be sent either on letterhead or through email)



Anytown Lions Club
Anytown, Ohio

Date

Dear ----

On behalf of the _____ Lions Club, I sincerely want to thank you for attending our New Member Night on _____

As you discovered at the meeting, we have a very active club. We are therefore always looking for good people so we can expand our services to our community and beyond. The more good people we have, the more we can do.

The members who met you at the recent event are convinced that you would be a terrific addition to our membership! I am certain you would find Lionism a rewarding and enjoyable experience. Not only will you help us fulfill our motto, "We Serve," but you will quickly begin developing many new friendships, many of which will last a lifetime.

I am therefore encouraging you to take a few minutes right now and fill out the Membership Application. You can return the completed application at one of our regularly scheduled meetings. Your sponsor, Lion will also be contacting you in the near future.

To keep you informed of when we meet and what we are doing, we will add your name to the distribution list for our club newsletter. The newsletter is published monthly and provides important information about the happenings within our Lions Club and our future events. (and/or refer them to club website but make sure it's up to date and contains the club calendar)

Once again, I want to encourage you to join the Lions Club. I'll be looking forward to seeing you at a future meeting.

Sincerely,

Title, _____ Lions Club

(Sample - Thank You for Joining Letter)

NOTE: Even if the rest of your outreach was done by email, by this time you will have their street address (as they filled out a membership application). We recommend this letter be sent formally, on letterhead stationary.)



Anytown Lions Club
Anytown, Ohio

Date

Dear _____,

On behalf of the _____ Lions Club, I sincerely want to thank you for deciding to join our organization.

As you discovered by visiting our club meetings, we have a very active club. We are therefore always searching for good people to enable us to expand our services to our community and beyond. The more good people we have, the more we can do, and we believe you will be a terrific addition to our club!

I am certain you will find our Lions Club a rewarding and enjoyable experience. Not only will you help us fulfill our motto, "We Serve," but you will quickly begin developing new friendships, many of which will last a lifetime.

Typically our club meets __dates & time__. Our next meeting will be ____. A Lion will call you prior to the meeting to secure reservations for dinner. The cost of the meal is \$_____.

You will also begin receiving Lion Clubs International's publication "The Lion" in the near future. It typically takes LCI about six weeks to process a new member application. If you don't start seeing "The Lion" within two months, please let me know.

Once again, I want to welcome you to the _____ Lions Club. I'll be looking forward to seeing you at our next meeting.

Sincerely,

Title, _____ Lions Club