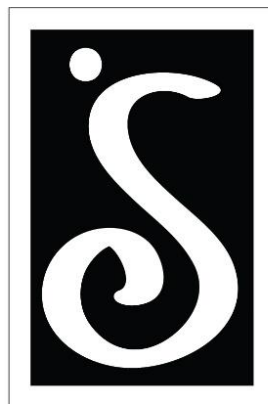


Founder Region
Soroptimist International of the Americas

2020

LEADERSHIP

Club / Officer / Member / Committee



S O R O P T I M I S T[®]

Investing in Dreams

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Introduction

In this handbook you will find basic information regarding the history of our organization, who we are, what we do and how we do it, and definitions for your reference. Included with the brief explanations will be links to various Soroptimist websites to find detailed documents, samples, updates and much more. Please take advantage of the wealth of information that is available at our Region, Federation and International websites.

Whether you are a new member or member of longer standing, our goal is to give you the tools, new or updated, to feel comfortable sharing our wonderful organization with others. If you are stepping into a leadership position, we hope the guidance provided will help you keep your club well informed and on the path to success.

The focus in our clubs should be to help women and girls take control of their lives and live their dreams. We can do this by improving their socio-economic status through access to the education they need in order to move ahead. This is the social change we seek...bettering the socio-economic status of women and girls locally and globally. Our overarching goal is to increase our collective impact. Increased collective impact is about the social change we effect – it's about quality over quantity. Focusing on providing women and girls with access to education is our single best chance to create a sustainable change in their lives.

Our thanks to past Founder Region Board members for their input and to the Past Governors of Founder Region who have continually offered the vision and foundation for ongoing Soroptimist education. Your guidance and support continue to help us move forward.

The most important thing to remember is to always have fun, embrace the journey of your membership and empower change in your club, your community and the world.

The 2018-2020 Founder Region Board

Governor Sylvia Crafton
Governor-elect Kris Chorbi
Secretary Pat Eileen Fisher
Treasurer Vicki Ham
District I Director Elise Balgley
District II Director Bev Gomer
District III Director Joy Swank
District IV Director Barbara Young
District V Director Dyann O'Brien
District VI Director Kristal Koga

The 2020-2022 Founder Region Board

Effective July 1, 2020

Governor Kris Chorbi
Governor-elect Vicki Ham
Secretary Joy Swank
Treasurer Tess Albin-Smith
District I Director Lenore Colarusso
District II Director Jackie Arnold
District III Director Colleen Ganaye
District IV Director Vicki Baldwin
District V Director Kristal Koga

Soroptimist History

In the early 1920's, women in North America had established themselves in the political arena through suffrage, and in the professional world as a result of World War I. The time was right for women actively engaged in professions and careers to come together for mutual support and friendship, and to serve the communities to which they belonged. The time was right for Soroptimist.

In the spring of 1921, Stuart Morrow, an organizer of men's service clubs, visited Oakland, California. He stopped by the Parker-Goddard Secretarial School, presuming it was owned by men. A preliminary meeting on May 31 led to a recruiting luncheon and on June 21, Mr. Morrow met with a number of women who officially launched the club toward its goal of 80 members.

Presentation of the club charter and the installation of Violet Richardson as the first President took place on October 3, 1921.

Resources – Founder Region: <https://www.si-founderregion.org/the-first-club.html>



Who We Are

Soroptimist is a global volunteer organization that provides women and girls with access to the education and training they need to achieve economic empowerment. Over 72,000 Soroptimists in 121 countries and territories support community-based and global projects benefiting women and girls. Our organization is particularly concerned with providing women and girls access to education, as this is the most effective path to self-determination. We deliver our mission through a volunteer network of members, clubs, regions, the federation and now, our online platform, Live Your Dream.org.

Soroptimist members belong to local clubs, which determine the volunteer projects conducted in their communities. Club projects range from supporting human trafficking prevention programs, to supporting domestic violence shelters, to providing mammograms to low income women, and to sponsoring self-esteem workshops for teenage girls. Clubs also participate in Soroptimist International of the Americas (SIA) Dream Programs.

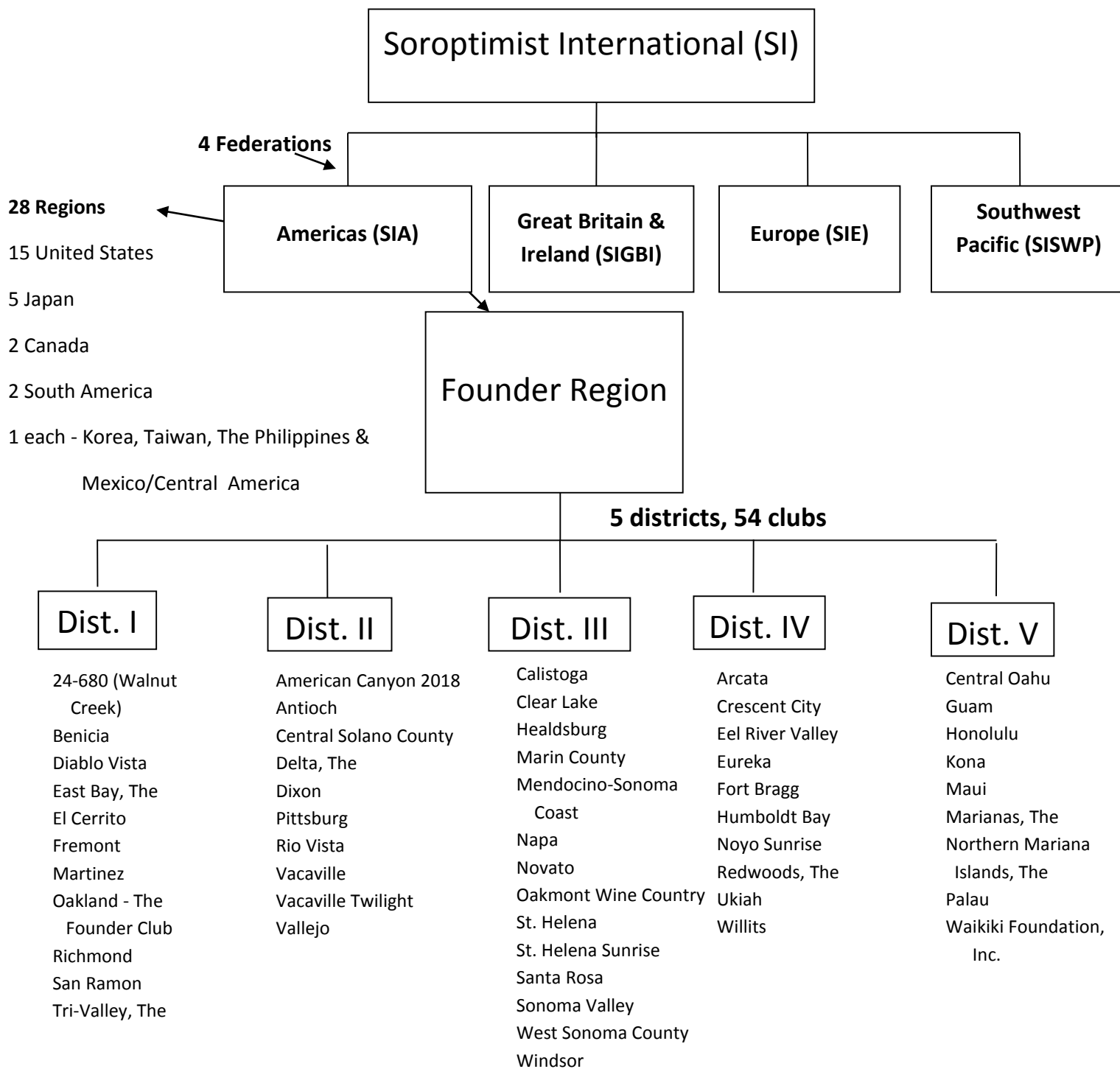
Online Resources:

Soroptimist International of the Americas (SIA): <https://www.soroptimist.org/about-us/index.html>

Live Your Dream online community: www.liveyourdream.org

Soroptimist International (SI): <https://www.soroptimistinternational.org/about-us/>

As of July 1, 2020, the District Realignment will reflect as shown on this page.
Who and Where We Are - Flow Chart



Who and Where We Are – Detail

International

Soroptimist International is the umbrella organization made up of the four Federations with the primary function of global advocacy and communications. An elected president and board heads Soroptimist International. The International President serves for two years. The international staff is housed at the headquarters in Cambridge, England. The only voting delegates to SI are the presidents and presidents-elect from each federation. An international convention is held once every four years on a rotation basis of the four federations. www.soroptimistinternational.org



Federation

Soroptimist International of the Americas (SIA) is one of the four geographical areas that make up Soroptimist International. Founder Region is one of 28 regions that make up Soroptimist International of the Americas. www.soroptimist.org



Region

Our region consists of an elected board that includes a governor, governor-elect, secretary, treasurer and one director per district which leads the region. Club Presidents are updated regularly on region and federation information and statistics at their Presidents' Roundtables held by their District Director (August, November, and February). Each club holds the rights for three delegates, therefore three votes, at the annual region conference where the business of the region is conducted. www.si-founderregion.org



Districts

Founder Region currently consists of six districts, referred to as Districts I, II, III, IV, and V. A realignment was approved to reduce the number of districts to five effective July 1, 2020. The districts of Founder Region include most of Northern California, the state of Hawaii, the U.S. territories of Guam and the Northern Mariana Islands, and the Republic of Palau.

Clubs

Each district is comprised of clubs. Although not required, clubs should strive to maintain 12 or more regular members. Each club should maintain 12 or more regular members and leadership should include a president, vice-president, secretary, treasurer and director who are elected by the membership.

Membership

In addition to intangible rewards such as friendship and personal fulfillment, members also receive the following benefits:

- Opportunity to participate in Soroptimist's life-changing programs
- "Best for Women," subscription is now online and offers important information and inspirational stories about the women and girls we serve.
- Subscription to "Soroptimist Summary," a monthly blog that keeps you updated on Soroptimist initiatives and activities.
- Access to numerous documents and tools available on the SIA website.
- Access to contact information for other members, clubs and leaders through SIA online directories.
- Leadership development and networking opportunities at club meetings, district meetings, region conferences, the biennial convention and other meetings.
- Opportunity to provide feedback, offer suggestions and voice opinions through Facebook, Twitter, LinkedIn, and YouTube, online surveys, and other market research activities.
- Opportunity to sign up and participate in Live Your Dream.org, a Soroptimist-powered, inspirational online community where you, your friends, and your family can support women and girls in their quest to lead better lives with the help of Soroptimist programs, while also aspiring to live your own dreams as well.
- Invitations to take advantage of special offers and discounts through our Corporate Sponsor Program, which enables members to receive personalized, value-added services from like-minded organizations that support the SIA mission.

Resource – Soroptimist International of the Americas (SIA):

<https://www.soroptimist.org/for-clubs-and-members/for-members/membership-benefits.html>

Why We Do What We Do

We are a women and girl-focused organization. Both women and girls, men and boys, live in poverty, face discrimination and have to overcome obstacles. But, throughout history, in every country in the world, women and girls face additional obstacles and discrimination because of their gender. Therefore, Soroptimist International of the Americas has determined that the purpose of our federation is to support programs that enable women and girls to take control of their lives so they can live their dreams.

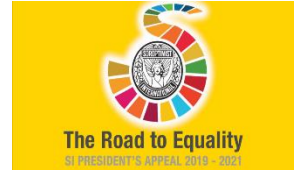
What We Do – Mission Statement

Soroptimist International of the Americas & Founder Region Mission Statement

Soroptimist is a global volunteer organization that provides women and girls with access to the education and training they need to achieve economic empowerment.



Programs & Projects



Soroptimist International (SI)

Local Soroptimist clubs around the world are encouraged to use education and empowerment to provide opportunities to improve the lives and status of women and girls in need.

Each year the International President determines a project, and it is called the **December 10th President's Appeal**.

- **The Road to Equality Appeal**, 2019-2021, will focus on issues already the focus of much of the SI advocacy work, such as child marriage, FGM/C, the rights of older women, human trafficking, migration, and domestic violence. A grassroots project for each topic will bring stories from the field that we can share, allowing Soroptimists to turn up the volume of our global voice.

International projects are funded by club and member donations to the specific project. All funds intended for international projects must be processed by Soroptimist International of the Americas (SIA) in order to accommodate foreign currency exchange.

Resource – Soroptimist International (SI): <https://www.soroptimistinternational.org/action/international-presidents-appeals/>

Soroptimist International of the Americas (SIA)

Participation in Soroptimist International of the Americas signature program, the **Soroptimist Live Your Dream Award: Education and Training Awards for Women** is strongly urged. This award was established to assist women with primary financial responsibility for their families to obtain the skills, training and education necessary to improve their employment status and standard of living for themselves and their families. When clubs participate in Soroptimist International of the Americas programs, they become part of an international effort to improve the lives of women and girls. Education has long been identified as the decisive factor in bringing women and families out of poverty into financial stability and the middle class. This brings long-term, permanent change. This focus requires our regions, our districts and our clubs to increase our efforts to support SIA's Live Your Dream Awards. Clubs should increase the number of awards they give, increase the amounts of the awards, provide support other than cash awards (such as mentoring), and remain in contact with their award winners and support them for the long-term.



Our new Soroptimist Dream Program, **Dream It, Be It: Career Support for Girls**, was launched in July 2014. This new program targets girls in secondary school who face obstacles to their future success. Clubs will work in partnership with girls in small groups or a conference setting to provide them with the information and resources they want and need to be successful. The topics covered include career opportunities, setting and achieving goals, overcoming obstacles to success and how to move forward after setbacks or failures.



Over half of our Live Your Dream Awards recipients are survivors of domestic violence, trafficking or sexual assault. Nearly all of the women and families we serve have overcome enormous obstacles including poverty, teen pregnancy, and drug or alcohol addiction. Many clubs support these programs and can apply for grants through the **Soroptimist Club Grants for Women and Girls**.



Clubs are also encouraged to participate in the **LiveYourDream.org** online campaign, which is a fundraising and public awareness activity that encourages all women to live their dreams while helping others to do the same. For more information, go to www.liveyourdream.org.

Soroptimist International of the Americas funds its monetary awards by donations from the clubs and members to the “Program Fund” by way of Founders Pennies, the Laurel Society or club donations to the Club Giving campaign.

Resource – Soroptimist International of the Americas (SIA):

<https://www.soroptimist.org/for-clubs-and-members/donate/index.html>

Founder Region Project - Fellowship



Founder Region Fellowship is a non-profit, incorporated entity within the Founder Region of Soroptimist International of the Americas. There are elected directors seated as the board, one from each district in the region. A treasurer shall be elected from the membership at the annual conference beginning in 2022. For the 2020-2022 biennium, the treasurer shall be appointed by the incoming Founder Region Fellowship (FRF) President from applications submitted by members of Founder Region. The Founder

Region Governor-elect appoints the president in the second year of the biennium. Fellowships and grants-in-aid, (totaling not less than \$20,000) are awarded each year to graduate women in the last phase of their studies at a university offering a doctoral degree, within the boundaries of Founder Region. This program is the Founder Region identifying project and is administered through Founder Region Fellowship.

Resource – Founder Region Fellowship: <http://www.founderregionfellowship.org>



Founder Region Programs and Awards

The **Violet Richardson Award** program is designed to recognize young women between the ages of 14 and 18 years of age who are engaged in volunteer action within their communities or schools. The award is given to young women who make the world a better place. This award is given at the club level, and submitted to district judging for additional awards and recognition at the annual Region Conference. Please use resources available on our Founder Region website.

Resource - Founder Region: <http://www.si-founderregion.org> (after July 1st, find it under Programs)

The **Barbara Stevenson "S" Club Award** is an award specific to Founder Region. These awards are offered solely for the purpose of honoring outstanding high school seniors who are members of a "S" Club of Founder Region. Nominations for this award are submitted by clubs with the selection to be made by the "S" Club committee. The number and value of the awards are to be determined by the Region Board. The application is available on the Founder Region website. Awards are presented at the Region Conference.



The **Julia "Bess" Combs Membership Increase Award** was originated by Soroptimist International of Santa Rosa to honor Past Southwestern Region Governor "Bess" whose passion was the chartering of new clubs. Bess was instrumental in chartering many new clubs in both Southwestern and Founder Region. The award is given to the club having the largest net growth in regular membership during the year from April 1 through March 31. This net growth is not to include that of a newly chartered Soroptimist club sponsored by the club. Net growth is understood to mean increase above and beyond current regular membership minus those who resign or membership is terminated for other reasons. The determination of the winner of the award is based solely on the Founder Region Treasurer's records, therefore, it is imperative that clubs get all new member transactions filed by March 31. The award is presented by the Membership Committee at the Founder Region Conference.

The **"Power of 8" Membership Retention Award** was established in 2014, and is given to clubs who have maintained 90% + of their members for the year from April 1 through March 31. Recognition is given at District Meetings.

Club Programs and Projects

Depending on the size of a club, there are many different types of programs and projects that clubs are involved in. The most successful clubs combine local programs and projects with region, federation and international programs and projects. Here is a list of typical programs and projects that a well-rounded healthy club might participate in:

International Level

- Support the December 10th President's Appeal

Federation Level

- Live Your Dream: Education and Training Awards for Women
- Dream It, Be It: Career Support for Girls
- Support Founders Pennies and Club Giving

Region Level

- Founder Region Fellowship
- Violet Richardson Award

Club Level

- Follow the Soroptimist Club Roadmap for Success
<https://soroptimist.imgix.net/05-for-members/club-management/roadmap-e.pdf>
- Supporting and working with "S" Clubs in your community. "S" Clubs are service clubs for junior and high-school students in our communities. They are considered "projects" of Soroptimist clubs. "S" Clubs are a vital part of the high-school extracurricular groups and are a great way for students to learn about serving others and helping in their community.
- Supporting local women's shelters
- Supporting women's health education programs
- Participate in Soroptimists Celebrating Success Awards. These awards recognize outstanding club projects that provide women and girls with access to the education and training they need to achieve economic empowerment. These awards recognize the best practices of Soroptimist clubs in each of the four pillar areas supporting the SIA strategic plan: fundraising, membership, program and public awareness. Due to the region on **July 1** of each year, the Soroptimists Celebrating Success Awards honor outstanding programs undertaken in that club year. Clubs don't have to wait until then to submit your applications - consider sending in the application right after completing your project.
<http://www.si-founderregion.org> (after July 1st, find it under Programs)
- The Ruby Award – For Women Helping Women is a club level award that recognizes a non-Soroptimist who has worked to improve the lives of women and girls through a self-driven project. Resource – Founder Region: <http://www.si-founderregion.org/ruby-award.html>

Resource - Soroptimist International of the Americas (SIA):

<https://www.soroptimist.org/for-clubs-and-members/for-clubs/index.html>

Club Administration

Soroptimist Club Board of Directors

A club board of directors has administrative control over the affairs, funds and property of the club except for modifying any action taken by the club. The board shall authorize budgeted payments from club funds; act upon invitations to membership, resignations, terminations, and disciplinary matters; receive such reports of committees as may be necessary between business meetings of the club; submit policy recommendations to the club, and perform such other duties as the club or the bylaws may require. It is their responsibility to maintain close contact with members and the community.

Your board of directors:

- Focuses on strategic planning in our Four Pillars:
 - Membership, Program, Fundraising, & Public Awareness
- Should be open and welcoming to ideas and concerns.
- Receives recommendations from committees.
- Makes recommendations to the club, but does not make policy changes without input from the members.

Club Leadership Responsibilities

A club board of directors can range in number from as many as ten to as few as five and should be based on the number of members in your club. There should be a president, vice president or president-elect, secretary, treasurer and a director. You may also have a parliamentarian, but she/he is not a voting (or elected) part of the board. As varied as the number can be, so can be the duties of the officers. **Club Bylaws and Procedures** (or standing rules) should include a description of the duties of each office.

President

The president shall preside at all meetings, carry out the policy of the club, engage all members, lead by example and represent to the community the spirit and character of Soroptimist. The president should be alert to changing needs in her/his community and be knowledgeable about region, federation and international aims.

Vice President or President-elect

The vice president or president-elect has the primary duty of supporting and working with the club president. Other duties may include ways and means (oversee club fundraisers), speaker/program planning, and may serve as a delegate to district and region meetings, especially when the club is small in number.

Secretary

The secretary has the specific responsibility of taking minutes that serve to preserve the club's business decisions and is responsible for the club's incoming and outgoing correspondence. With the onset of electronic mail, few formal letters of invitation and thanks are required. Timely collection and sharing of mail is also important. The club secretary may also be assigned meeting notice and attendance duties.

Treasurer

The treasurer records and protects the funds of the club and provides monthly reports so that the members of the Board as well as club members know the club's financial status. Because the treasurer has as full a job description as the president, she/he rarely has any other duties assigned to her/him.

Director

The director description varies widely from club to club. The director's primary purpose is to be the liaison between the club members and the board of directors. Often, the director will be a past president or other past officer that can provide experience and insight of the workings of Soroptimist. Other clubs have a newer member serve as the director, which allows her/him to gain experience and knowledge while serving on the board.

Delegates

The delegates have the responsibility of voting on behalf of their members, speaking for their concerns and, most importantly, bringing back complete information concerning all Soroptimist matters that affect the club. Delegates should be informed about matters on which a vote is to be taken and know how their club members feel about it.

Committees

Club committees are the vehicles through which Soroptimist activities are accomplished. Committees promote official Soroptimist programs, and undertake the various technical aspects of efficient club operation. Ad hoc committees undertake special assignments. Clubs may have as many or as few committees as they like.

Resource – Soroptimist International of the Americas (SIA):

<https://www.soroptimist.org/for-clubs-and-members/for-clubs/club-administration.html>

Club Operation Guidelines

Presidents

Ten Recommended Principles for a Club President

1. There is honor in being president of your club. Give graciously and generously of yourself.
2. Represent your club openly at community events and meetings.
3. Learn the Soroptimist laws well and become familiar with Soroptimist educational tools. You are the person to whom questions relating to protocol and policy are directed.
4. Communicate - promptly and effectively! You are the conduit through which communications flow from region and federation officers and committees. Pick up and read mail immediately. Use your club email address assigned by SIA and reply promptly, and/or forward information to committees and members as applicable.
5. Make your committee appointments wisely so that the talents of your club members may be used effectively in service.
6. Prepare a president's planning calendar. Successful leadership depends on careful planning.
7. Abide by Soroptimist law; it is for your protection.
8. Encourage club members to attend district meetings, region conferences, region training, and federation and international conventions so that all members will have a better opportunity to know and share Soroptimist.
9. Remember to use the region board and committees as a resource. They are knowledgeable, and their experience can provide great assistance.
10. As the presiding officer, you must be fair, tactful and just, and above all gentle and kind.

Presidents - How To “Get the Hang of It” Sooner, Not Later

Club presidents are charged with ensuring that their club supports our Soroptimist mission. An effective president understands the importance of her role to motivate, manage and move forward. She/he also realizes it cannot be done alone. It is important that the president facilitates teamwork and takes advantage of the diversity of members in her/his club by utilizing their expertise and talents. This combination makes a strong, happy and healthy club. Club presidents have the opportunity to implement innovative programs and projects that will contribute to the future growth and influence of our organization. By continually evaluating and adapting projects and practices, clubs will retain enthused members, recruit effectively and have a positive impact on their communities at large.

The Basic “How To”:

1. **Teamwork** – You don’t have to do it all yourself; and if you try to, it won’t work very well. Practice the 4 C’s of Teamwork.
 - Consideration of others
 - Collaboration and cooperation with others
 - Concern for others
 - Communication with others
2. **Attitude** – Keep yours tolerant and good-humored. Leading a volunteer organization presents some special challenges.
 - You can’t force compliance; members are volunteers, not employees
 - You have to rely on persuasion and build consensus
 - You have to earn respect
 - You have to bring old and new together; leaders have to bond with all members
 - There is a significant time commitment for the leaders
 - There is competition from other organizations
 - Members need a reason to be there
 - Leaders need to create excitement for benefit of membership
 - Follow-up is very important; but make it non-confrontational
3. **Organization** – Get organized early, before the beginning of the next club year.
 - Appoint coordinators and committees
 - Have a club discussion about goals, make plans, have an implementation schedule, know where you’re going
 - Follow-up and communicate
 - Organize yourself. Use whatever method works for you, but do it in the beginning and do it consistently

Presidents – Why Should You Have An Agenda?

In any kind of meeting, the person leading the meeting should preside from an agenda – an outline of items, listed in order of importance, that are to be accomplished at the meeting. Having an agenda helps keep the meeting on track and saves valuable time. The basic structure of an agenda comes from the order of business as established either by the parliamentary authority or the rules of the organization.

Below you will find a commonly used order of an agenda. Before any business can be transacted at a meeting, the president should determine if a quorum is present. The president then calls the meeting to order and proceeds with the club's established order of business. The sample below may be revised to accommodate your club's needs.

General Meeting Agenda

Call to order

One rap of the gavel.

"The meeting of _____ will please come to order."

Opening

Can be an invocation or grace, then — if appropriate — a pledge of allegiance.
(Introduction of VIPs can be given here.)

Minutes

(If a quorum is present):

"The secretary will read the minutes of the _____ meeting. Secretary _____."

"Are there corrections to the minutes?"

"The minutes stand approved as read/corrected."

"Is there any correspondence?"

Treasurer's Report

"Next business in order is the treasurer's report. Treasurer _____."

"Are there any questions?"

"The report will be placed on file for financial review."

"Are there any bills?" (The treasurer may either move that they be paid, or it can be done by general consent.)

Reports of Officers, Board and Standing Committees

(If there is a Board report or recommendations, ask the secretary to read them.)

(Call only on standing committees having reports. This should be predetermined.)

Special Committee Reports

"May we have the report of the committee appointed to (consider/investigate/act)."

Unfinished Business

Unfinished business and general orders. Any general orders not taken up at the last meeting are now taken up.

"The question on _____ was postponed to this meeting."

"The question is on _____."

"The question on _____ was postponed to the last meeting, but due to lack of time was not disposed of; therefore, the question is on _____."

New Business

"The next business in order is new business. What is the pleasure of the assembly?"

1)

2)

"Is there further new business?"

Program

"Will the program chair present the program?"

(If an outside speaker is utilized, the program may be presented earlier to allow the speaker to leave following her or his presentation.

Announcements

(President gives hers first, then:)

"Are there further announcements?"

Adjournment

"If there is no further business, (pause) the meeting is adjourned."



S O R O P T I M I S T[®]

Investing in Dreams

2020-2021 Founder Region Club & President Time Line & Check List

<u>Done</u>	<u>Date</u>	<u>Activity</u>
<input type="checkbox"/>	July 1	Club & Region Officers officially take office
<input type="checkbox"/>	July 1	Dues to Federation and Region – Confirm with Treasurer
<input type="checkbox"/>	July 1	Form 200 deadline to Federation - Copy to District Director
<input type="checkbox"/>	July 1	Soroptimists Celebrating Success entries due to Region Chair
<input type="checkbox"/>	July	Sign new signature cards at the club's bank
<input type="checkbox"/>	July	Download Live Your Dream Award poster from SIA website and distribute in your community and local colleges
<input type="checkbox"/>	July	Complete Committee sign-up & provide to roster. Appoint committee chairs and members if not yet voluntarily assigned.
<input type="checkbox"/>	August	Ensure that club's financial books are reviewed for the previous year (Complete by August 31)
<input type="checkbox"/>	Aug/Sept	Attend Presidents' Roundtable (TBD)
<input type="checkbox"/>	September	Remind Treasurer to file Federal and State tax forms by November 15
<input type="checkbox"/>	September	Ways & Means begins plans for club fundraisers, if not already done in the previous club year
<input type="checkbox"/>	September	Recruitment & Retention - begin plans for member mixers/recruiting event
<input type="checkbox"/>	Sept/Oct	Publicize & Promote Live Your Dream Award Applications
<input type="checkbox"/>	Sept/Oct	Plan for and attend District Meeting (check Region Calendar for specific dates)
<input type="checkbox"/>	October 3	Founders Day, 1921. (In 2021- 100 Year Anniversary Celebration in San Francisco)
<input type="checkbox"/>	October	Breast Cancer Awareness Month; Domestic Violence Awareness Month
<input type="checkbox"/>	October	Leadership Training District V
<input type="checkbox"/>	November	Receive and distribute November Mailing to club members
<input type="checkbox"/>	November	Attend Presidents' Roundtable (TBD)
<input type="checkbox"/>	November 15	Live Your Dream Award club deadline for submission of applications

2020-2021 Founder Region Club & President Time Line & Check List

<u>Done</u>	<u>Date</u>	<u>Activity</u>
<input type="checkbox"/>	November 15	Violet Richardson Award applications due to clubs (suggested date)
<input type="checkbox"/>	November 15	Federal and State tax forms must be filed
<input type="checkbox"/>	November 15	Proposed changes to Founder Region and Founder Region Fellowship Bylaws due
<input type="checkbox"/>	November 25	International Day for the Elimination of Violence Against Women – “Orange the World” Campaign begins and continues until December 10
<input type="checkbox"/>	December 1	Nominations for REGION Nominating Committee positions due to Region Nominating Chair and District Nominating Committee Representative
<input type="checkbox"/>	December 10	Soroptimist International (SI) President's Appeal & UN Human Rights Day
<input type="checkbox"/>	December/January	Judge Live Your Dream Award applications
<input type="checkbox"/>	January	Appoint club's nominating committee
<input type="checkbox"/>	January 11	National Day of Human Trafficking Awareness
<input type="checkbox"/>	February	Founder Region Fellowship Month; plan Fellowship Fundraiser
<input type="checkbox"/>	February	Club's Nominating Committee prepares slate of officers
<input type="checkbox"/>	February	Plan club event honoring recipients of Soroptimist Program Awards
<input type="checkbox"/>	February	Attend Presidents' Roundtable (TBD)
<input type="checkbox"/>	February 1	Live Your Dream Award application and transmittal due to District Representative
<input type="checkbox"/>	February 1	Violet Richardson Award Club winner application and transmittal due to District Representative
<input type="checkbox"/>	Within 1 month of completion	Dream It, Be It: Career Support for Girls region transmittal form due to Region Chair
<input type="checkbox"/>	February 15	Live Your Dream Award district winner applications due to Region Chair

2020-2021 Founder Region Club & President Time Line & Check List

<u>Done</u>	<u>Date</u>	<u>Activity</u>
<input type="checkbox"/>	March	Women's History Month
<input type="checkbox"/>	March 1	Deadline for receipt of Soroptimist Club Grants for Women and Girls applications at SIA Headquarters
<input type="checkbox"/>	March 8	International Women's Day
<input type="checkbox"/>	March 31	Deadline for new member transaction forms, and Fellowship contributions for recognition at Founder Region Conference.
<input type="checkbox"/>	March/April	Region Conference Registration deadline - TBD
<input type="checkbox"/>	April	Finance Committee to prepare and present the club proposed budget
<input type="checkbox"/>	First weekend in May	Founder Region Conference
<input type="checkbox"/>	May	Form 200 due to Federation and District Director (deadline – July 1)
<input type="checkbox"/>	May	Begin preparation of dues forms provided by Founder Region and SIA
<input type="checkbox"/>	May	Prepare and distribute Dues Statements to club members
<input type="checkbox"/>	May	Review SI/SIA (as applicable) Call to Convention; plan and prepare registration
<input type="checkbox"/>	May 31	Club Giving contributions due to SIA (use Financial Transaction Form & mark 10% if applicable).
<input type="checkbox"/>	May/June	Budget proposed/approved at business meetings
<input type="checkbox"/>	June 1	Dream It, Be It Evaluation Form due to SIA (final deadline for year – submit within one month of completion of event)
<input type="checkbox"/>	May/June	Annual committee reports due for business meetings, if applicable
<input type="checkbox"/>	June 12	Leadership Training, Districts IV
<input type="checkbox"/>	June 13	Redwood Memorial Grove Service
<input type="checkbox"/>	June 19	Leadership Training, Districts I, II, III
<input type="checkbox"/>	June/July	Hold Installation events, invite region board members
<input type="checkbox"/>	June/July	Joint club board meeting for transition and transfer of materials
<input type="checkbox"/>	June/July	Evaluate club activities, programs and projects
<input type="checkbox"/>	July 1	SIA Federation and Region Dues must be received by this date

Transition Checklist for Outgoing Presidents

Check List of “To Do” items to help the incoming president be successful.

1. _____ Form 200 due to District Director by July 1st. Include LYD & DI, BI chair information.
2. _____ Pay Club Dues to Region and SIA by July 1.
3. _____ Club’s Bank Accounts - update signature cards.
4. _____ Meeting location – update contract if needed.
5. _____ Club’s Post Office Box – pass on key to incoming president.
6. _____ Club’s Storage Unit - pass on key to incoming president.
7. _____ Club Email – organize emails into folders and delete junk mail.
 - Google – Mail.office365.com
 - Username – si(clubs name)@soroptimist.net
 - Password – sia(club ID number) or provide password if changed.
8. _____ Club Installation – designate chair with approval of incoming President.
9. _____ Forms/Documents. Provide hard copies or electronic sample copies to incoming President.
 - Board and Business Agendas
 - Budget
 - Bylaws and Procedures
 - Club Activity Reports
 - Club Brochure
 - Club History
 - Club Roster
 - Club Member Email List
 - Club Newsletters
 - Committee Sign-up Sheet
 - Emails sent out to members on regular basis
 - Facebook/Other Social Media Sign-ins & Passwords
 - Fellows List
 - Founder Region Roster
 - Laurel Society Members List
 - New Member Form
 - Past President’s List
 - Prayer and Pledge
 - President’s Round Table Agendas/Minutes
 - Reimbursement Form
 - Website Sign-in and Password
 - Year End Treasurer Report
10. _____ Provide one on one training and guidance to ensure smooth transition and club stability!

Vice President / President-elect - Programs

Guidelines for Successful Programs

Enjoyable, dynamic meetings keep members interested and active, and they attract new members to your club. Plan programs that will make members want to attend.

What makes a great club meeting?

- The meeting begins and ends on time.
- All meeting participants arrive on time and are prepared.
- Members and guests are greeted as they arrive and are made to feel welcome.
- The program is interesting and enjoyable.
- All members present have an opportunity to participate.

You contribute to a successful meeting by selecting speakers who can present topics of interest to club members with inspiration, motivation and energy. Work with your committee members to make a list of potential speakers and program topics. Contact speakers and schedule dates. Use the following steps to ensure you and the speakers have the correct information:

Initial Contact with the Speaker

1. Provide the speaker with the following information:
 - Facts about Soroptimist
 - Type of meeting, who will be there, where speaker will be seated
 - Date, time and desired length of the speaker's presentation
 - Financial arrangements (if any)
2. Get the following information from the speaker:
 - Biographical information for the introduction
 - Correct spelling of name and title
 - Equipment needs (projector, screen, easel, etc.)
 - Information about special dietary needs and whether speaker will bring guests

Day Of Presentation: Greet speaker at the door, pre-arrange for handouts to be displayed and introduce the speaker. Thank them!

After The Meeting: Send a "Thank you" note to the speaker. Write an article about the meeting for the club newsletter or local media.

Vice President / President-elect - Ways and Means/Fundraising

The Nuts and Bolts of Fundraising

There are four major objectives for any successful fundraising event.

- It must be financially successful.
- It must generate enthusiasm for the effort.
- It must reinforce and enhance the positive image and perception of your club.
- It must create and reinforce support for the on-going efforts and goals of the club.

Why have a fundraiser?

- To raise funds to support a program or project.
- To demonstrate member enthusiasm for Soroptimist programs.
- To raise public awareness about Soroptimist.
- To increase club membership.
- To socialize and have fun.

Types of fundraising

- Passive - funds generated from members and supporters from purchases of products and services provided by outside organizations or businesses. Example: A percentage of sales given to the club from the purchase of meals from a local restaurant or items from a retail store (jewelry).
- Active - events and projects planned and executed completely by club members.
- Soroptimist International of the Americas Club Grants for Women and Girls
- Outside grants from private foundations or corporations

Suggestions

- Competition is keen for donations. Clubs may be more successful by planning one major fundraiser and two to four small projects to supplement.
- Research what events have worked in the community.
- Review what resources the club has - volunteers and financial.
- Research what type of events are currently popular:

Types of Events

- ✓ Community events: fairs, home tours, art shows, walkathons
- ✓ Merchandise events: auctions, flea markets, candy sales
- ✓ Food and gala events: dinners and teas
- ✓ Entertainment events: plays, film festivals, concerts
- ✓ Holiday events - Christmas, Mother's Day, Halloween
- ✓ Competition events - athletic, cook-off's, art

Vice President / President-elect – Helpful Hints To Up Your Assets (Fundraising)

1. Create an overall plan that includes a major fundraising event and two to four minor fundraising activities which complement each other and your club.
2. Brainstorm about a variety of event possibilities, and narrow the choice. Determine the audience or customer the event will appeal to.
3. Let club members vote. No event is successful without the enthusiasm and support of volunteers.
4. When the event is selected, prepare a comprehensive plan including promotion. Pay attention to detail and structure committees to fit the event.
5. Set goals that are financial and non-financial.
6. Be prepared and willing to modify events. Even successful events lose their appeal. Add some zest and sizzle by putting a twist on old ideas, such as holding the event in a unique place, conducting pre-event activities or selecting an appealing theme.
7. The cause may only be a secondary reason for people attending the event; but you should make clear to the contributors what portion of their donation could be considered a charitable gift.
8. Prepare a contingency plan in case something goes wrong.
9. Keep accurate records.
10. Price should be based on profit expectations, competition and what value your customers give to the goods or services received.
11. Each year evaluate whether you can infiltrate the existing market, attract new market segments or alter the event.
12. Look for ways to combine events, i.e. dinner and an auction, silent auctions and live auctions.
13. Spend as little as possible on expenses. Look for ways to get donations in-kind and seek corporate funding.
14. Select leaders and volunteers who are enthusiastic, work well with people, are dedicated and committed to the success of the event.
15. Evaluate results.

Reference: Fund-Raising Events, Strategies & Programs for Success
by Ralph Brody and Marcie Goodman and
Putting the fun in fund raising by Phillip T. Drotning

Secretary - Tips on Writing Minutes – Do This, Not That

Do This:

- Use a copy of the agenda as a guide in taking minutes and writing them. Ask your club President to provide you with a copy of her/his working detailed agenda. This will help with recording notes.
- Record the name of the maker, not the one who seconds the motion.
- Record the names of all officers and committees from whom reports are received at the meeting and only the most important facts of these reports. Attach the original report to the official minutes.
- Request that all main motions and amendments be written; then file the copies of the motions with the secretary's notes. All motions should be recorded verbatim.
- Record all lost main motions as well as those that are adopted.
- Record the names of persons appointed to committees and the members elected to office. Also notify them of their appointment or election unless this duty is assigned to another. Refer to your club's bylaws for duties.
- Record the number of votes on each side of a vote ballot or in a counted vote.
- Write the minutes as promptly as possible after a meeting and send a copy to the president. Call unfinished business items to the president's attention.
- Prepare minutes of board meetings and be ready to report recommendations of the board to the business meeting. Be ready to move the adoption of any motions recommended by the board. Make a copy of the board minutes and distribute to all board members.
- Take the following to every meeting: (1) the book of minutes, (2) a copy of the bylaws and the standing rules, (3) a list of committee chairpersons and committee members, (4) any other records that are needed in the meeting, (5) a copy of Robert's Rules of Order Newly Revised.
- Be specific when recording corrections to the minutes. Record the date, page, and the minutes of the meeting in which the correction was made. Also, using contrasting ink, record the corrections in the margin of the minutes that are being corrected, noting the date of the correction.
- Send a copy of the minutes to those who, in accordance with the club's rules, are to receive them.
- Sign the minutes and initial them after approval.
- REMEMBER: Record facts only.

Not that – don't record:

- Opinions or discussion unless directed to do so by the assembly.
- Main motions or any subsidiary motions that are not stated by the presiding officer or motions that are withdrawn.
- An entire report in the minutes unless directed to do so by the assembly.
If it is long or complicated, the minutes can state, "Report attached to original minutes".

- There is no need to include “respectfully submitted” at the close of the minutes.
- Never record opinions.

Taking the Minutes

There are seven essential matters that must be covered in all minutes:

- The kind of meeting
- The name of the group
- The date and place of the meeting
- Whether the regular presiding officer and secretary were present, or, in either’s absence, the name of the substitute
- Whether the minutes of the previous meeting were approved
- All main motions, points of order and appeals – whether sustained or lost – and all other motions that were not lost or withdrawn
- The hours of the meeting

Additional Resources: <https://www.soroptimist.org/for-clubs-and-members/for-clubs/club-administration.html>

“Empowering Change”



&

*Dream **BIG** for the future!*



Sample Board Meeting Minutes

Meeting place and time:

The Board meeting of Soroptimist International of Our Town was held at 7:30 p.m. on Monday, December 2, 2019, at President Ann's home.

Board members present: (list names)

Minutes:

The minutes of the previous Board meeting, held Monday, November 4, 2019, were distributed by the secretary, Judy Williams, and approved as corrected.

Treasurer's report:

The treasurer, Jane Green, reported a balance on hand of \$8,924.64. A detailed report of income and expenses compared to budget is attached.

Correspondence:

The following correspondence was read and action taken as indicated:

Soroptimist International of Their Town contacted us regarding sponsoring the Forum for Women Leaders to be held at the City College Leadership Development Center. It was moved by Jane Green, seconded and carried, that we recommend to the membership that the corresponding secretary write a letter to Soroptimist International of Their Town accepting the invitation to assist in sponsoring the forum.

Paula Stone has submitted a letter of resignation. Andrea Thompson moved that we accept the resignation with regret. The motion received a second and was accepted.

Unfinished business:

(list action on unfinished business)

New business:

City-owned domestic violence shelter:

President-elect Tanya Day reported that city council is considering a city-owned domestic violence shelter, and is looking for advocates for the shelter to attend a special meeting in two weeks. Andrea Thompson moved, that the Board recommend to the club that Soroptimist International of Our Town go on record in support of the city-owned domestic violence shelter, and that the club be represented at the meeting in two weeks. Motion carried.

(list action on additional new business)

Committee change:

Due to the resignation of Paula Stone, President Ann named Jennifer Tanabe as the new Program Speakers chair.

There being no further business, the meeting was adjourned at 8:40 pm.

(Signed) Judy Williams
Secretary

Sample Business Meeting Minutes

Meeting place and time:

The business meeting of Soroptimist International of Our Town was held Monday, December 9, 2019. The meeting was called to order by the president, Ann Smith, at 11:45 a.m. There were 21 members in attendance of a total membership of 29.

Minutes:

1The minutes of the previous business meeting held on Monday, November 19, 2019, were distributed by the secretary and were approved as distributed.

President's Report:

President Ann reported giving a speech at the annual meeting of the county supervisors regarding Soroptimist's efforts to improve the lives of women and girls, in the local community and throughout the world.

Treasurer's Report:

Jane Green, treasurer, presented her report for the period ending November 30, 2019, reflecting a balance of \$8,924.64. The treasurer's report was filed for review.

Correspondence:

A letter from Soroptimist International of Their Town regarding sponsoring the Forum for Women Leaders, to be held at the City College Leadership Development Center, was read. The Board of Directors' recommendation to accept the invitation was motion carried and the corresponding secretary will write a letter accepting the invitation to assist in sponsoring the Forum for Women Leaders.

Committee reports:

Program: Live Your Dream Awards coordinator, Kendra Lane, reported that Lisa Lilly, Eileen Eng, and Trish Gorman have accepted invitations to serve as judges for this year's awards.

Membership: Chair Cynthia Swann announced the club has received the names of five interested prospective members in the past two weeks. Each has been invited by phone call and letter to join us next week for our winter program, "Philanthropy and You," and all will be in attendance.

Public Awareness: Chair Donna Kranz reported that the Live Your Dream Awards radio public service announcement aired three times last month, which may explain the 100% increase in requests for applications.

International Women's Day Luncheon: Chair Sue Black reported that the event will be held on Monday, March 9, 2020, at 12 noon. The price will be \$25, including tax and tip.

Unfinished business:

Ruby Award: The postponed motion to consider the club's participation in the Ruby Award program next year was approved. Andrea Thompson moved to direct the Finance Committee to budget \$500 for the award in next year's budget. Motion carried.

(list additional unfinished business)

New business:

City domestic violence shelter: After lengthy discussion, the Board's recommendation that we go on record in favor of a city-operated domestic violence shelter was adopted. Barbara Hall volunteered to be our representative, which was approved by consensus.

(list additional new business)

Resignation:

Judy Williams, secretary, announced the board had accepted with regret the resignation of Paula Stone.

There being no further business, the meeting was adjourned at 12:30 p.m.

(signed) Judy Williams

Secretary

Treasurer – Responsibilities and Guidelines

Serving as club treasurer can be very rewarding. There is no position in your club that will teach you more about Soroptimist.

The club treasurer has many responsibilities. To list a few:

- Receive, record and deposit all funds in the financial institution authorized by the board.
- Serves as an advisor to the club finance committee and furnishes financial reports as required by the club bylaws and as requested by the board or the club.
- Distributes copies of monthly and annual financial statements to members. This saves much time during board and business meetings in addition to providing the members with printed materials, which are better understood than oral reports.
- Pays all bills, checking to be sure the club's budget, the board or the club has authorized the expenditure. The club's money belongs to the entire club and cannot be expended without club authority.
- Places orders for supplies from SIA Headquarters.
- Processes dues payments for both SIA and Founder Region.
- Makes sure all Federal and State tax forms are filed each year in a timely manner, either by filling out the required forms or having the forms prepared by a tax professional.
- California clubs – register with the Attorney General's Registry of Charitable Trusts if conducting a raffle; also must file annual reports.
- If applicable, filing sales and use tax returns.
- Maintaining membership records.
- Prepares for annual club review of financial records.
- Works with the club finance committee to prepare the annual budget.
- Perform any other duties as set forth in the club bylaws.

Additional information may be found in the club treasurer's manual. A sample budget is provided for your reference.

Founder Region Club Treasurer's Manual: Download manual from "Forms & Applications" page <http://www.si-founderregion.org> (after July 1st, find it on the Resources Page under Handbooks)

Additional resources: <https://www.soroptimist.org/for-clubs-and-members/for-clubs/club-administration.html>

SIA Financial Transaction Form: found on the club administration page on the SIA website or on the Founder Region website under Forms & Application.

<https://soroptimist.imgix.net/05-for-members/club-management/financialtransactionform.pdf>

Sample Club Budget

Income

Membership dues (club, region and federation)	\$ _____
Fundraiser proceeds	\$ _____
Donations	\$ _____
Grants	\$ _____
Interest	\$ _____
Miscellaneous	\$ _____
Total income	\$ _____

Expenses

Program expenses

Soroptimist Live Your Dream Award	\$ _____
Soroptimist Dream It, Be It Program	\$ _____
Soroptimist Violet Richardson Award	\$ _____
Soroptimist Ruby Award	\$ _____
Club Giving donation to SIA (recommended: 10% of local fundraising)	\$ _____
Founders' Pennies*	\$ _____
Program public awareness/publicity	\$ _____
<i>Program Expenses subtotal</i>	<i>\$ _____</i>

Membership expenses

Region dues	\$ _____
Federation dues (SIA dues and fees, SI dues, club liability insurance)*	\$ _____
Region fee(s)	\$ _____
Mandatory federation convention fee (even numbered years only)*	\$ _____
Region conference delegate(s)—meals, lodging	\$ _____
Federation convention delegate—meals, lodging (even numbered years only)	\$ _____
District meeting	\$ _____
Region Leadership Training	\$ _____
Membership pins and nametags	\$ _____
<i>Membership expenses subtotal</i>	<i>\$ _____</i>

Fundraising expenses

Fundraiser/Event expenses	\$ _____
<i>Fundraising expenses subtotal</i>	<i>\$ _____</i>

Operating expenses

Operating expenses (postage, stationery, bank fees, web hosting, etc.)	\$ _____
<i>Operating expenses subtotal</i>	<i>\$ _____</i>

Total expenses **\$ _____**

*For current dues and fees amounts, visit the member's area of www.soroptimist.org or contact headquarters at siahq@soroptimist.org.

Club Treasurer Forms – Founder Region Website

<https://www.si-founderregion.org/forms-and-applications.html>

Membership Dues - 2020-2021 Founder Region Annual Dues Statement

Membership Dues - 2020-2021 New/Reinstated Member Forms

Club Treasurer Checklist

Form 200

NOTE - On July 1st, these forms can be found on the new region website here:
<https://www.si-founderregion.org> – go to the Resources Page, under Treasurer Forms.

Committees

- Are the vehicles through which Soroptimist activities are accomplished
- Promote Soroptimist programs and undertake the various technical aspects of efficient club operation
- Receive direction from membership, club officers and previous recommendations
- Tasks should be clearly defined
- Members should have a good understanding of region and federation programs and operations
- Should keep close contact and work cooperatively with the corresponding region committee chairs

Appointment of Committees

- The president facilitates the formation of committees within 30 days after election of the president or **no** later than September
- Administer the Capacity Inventory for Individuals (CII) – found on SIA website <https://www.soroptimist.org/for-clubs-and-members/for-clubs/member-retention-tools.html>
- Review roster for hidden talents
- President serves as an ex-officio member of every committee except the nominating committee
- Treasurer may serve as a member of the finance committee but not as the chair

Reporting

- Committee chairs keep summary of deadlines and activities
- Remind club members of such deadlines and keep them informed
- Give standing and special committee reports at club meetings
- Complete Celebrating Success Report at the completion of project/event

Be mindful when serving on a committee

- All members should be treated with respect and integrity
- Support committee decisions and be willing to carry out assignments
- Motivation comes from within us
- Members do the best they can; when and how often they can—we are all valuable volunteers
- Before you speak, **THINK**:
 - **T** Is it **TRUE**
 - **H** Is it **HELPFUL**
 - **I** Is it **INSPIRING**
 - **N** Is it **NECESSARY**
 - **K** Is it **KIND**

In Summary

- Committees are the heart of a Soroptimist club
- Without Committees, it would be difficult to effectively accomplish the organization's goals and objectives
- Committees have been a source of excellence, providing many innovative ideas for successful programs throughout Soroptimist history
- Committees have provided the vision and drive to move forward in service to our communities and the world
- Serving on a committee is a great way to build leadership potential with your members

Technology Tips

Using Your Soroptimist Club Email Account

Every club has been assigned a free email account by Soroptimist International of the Americas. This is the **ONLY** method that SIA will use to communicate with your club – sending important emails that will include notice of elections, Soroptimist Summaries, and other communications. It is extremely important that the club email address is checked regularly so your club is informed about the latest news and information.

Instructions for how to use this email account and how to use the Guide to Office365 Club Email are on the SIA website: <https://s3.amazonaws.com/soroptimist-media/05-for-members/club-management/guide-to-office365-club-email-management.pdf>

Signing in and Accessing Office365 Club Email

How to sign-in and access Office365 club Email

1. Open an internet browser window (i.e.: Internet Explorer, Firefox, Safari, etc.)
2. In the address line type: **mail.office365.com** and press “enter” on the keyboard.
3. Enter your Microsoft Account ID = **siclubname@soroptimist.net**
4. Enter your Password = 6 digit club ID number preceded by sia (i.e. sia111111)

Forwarding Club Email to Another Email Address

1. From the main inbox screen, click the gear icon on the top right and choose “Options”.
2. On the next screen, click on the “Forward your email” link located in the list of “shortcuts to other things you can do” on the right.
3. In the forwarding section of account options, enter the email address you wish to forward email to and choose whether or not to keep a copy in the Outlook Web App.
4. After you click “start forwarding” to complete the changes, you should now see the stop forwarding button and save button.
5. Setup of message forwarding is now complete.
6. Send a test message to your club email account to ensure forwarding is functioning as you intended.
7. If you want to turn off forwarding, click the “stop forwarding” button.
8. If you want to change the email address you are forwarding to, enter the new email address and click “save”.

Instructions for Using Writable PDF Documents

Some forms are writable PDF files so members/applicants can type information right onto the document. If a document is a writable PDF it is designated in its title. To type on a writable PDF:

- First save the writable PDF file onto your computer. (If you immediately begin filling out the writable PDF file without having saved it onto your computer, your information will not save.)
- Open the writable PDF file you just saved onto your computer.
- Using your mouse, click on the blank space designated for form answers.
- A cursor will appear.

- Type in the correct information.
- Once all parts of the form are personalized, select Save As from the File menu to save the document.

How to convert your PDF newsletter or document to JPG to post on Facebook

- Open your document in Adobe Reader
- Make sure size of image is reduced so you can see entire document on the screen without having to scroll up or down.
- Click “Edit” then Click “Take a snapshot”, then Click on the image on your screen.
- You will see a confirmation that the image has been copied.
- Open “Paint” program on your computer.
- Paste the image into Paint directly. Use “Ctrl V” to paste if paste option is not visible
- Click the crop button so you can reduce the size of the image to that which you just copied from Adobe.
- Save As a .png or .jpg file on your computer.
- Now you can open Facebook and upload the photo file from your computer.

***Note: Due to Adobe upgrades, many of these steps may not be necessary any longer. Just open the PDF document in Adobe and "Save As" JPEG file**

Recognition & Branding Tools

We're stronger when we communicate with one brand and one voice. Having a consistent look and tone is important to increasing recognition of Soroptimist, both locally and globally.

It is important that all levels of our organization use the “S” logo consistently, and not alter its look in any way. Having a consistent visual identity is essential to successful branding efforts, which affects SIA’s ability to increase our recognition, recruit members and fundraise outside our organization.

For more information and logos: <https://www.soroptimist.org/for-clubs-and-members/federation-information/recognition-and-branding-tools/index.html#resource-group-1325>



Creating a Digital Signature

Click on Digital Signature Box in Document

Click **“Configure New Digital ID”**

You can choose any of the 3 options but the easiest is **“Create a new Digital ID”**

* The “Digital ID from a file” option is also fairly easy. Sign a piece of paper and scan to your computer.

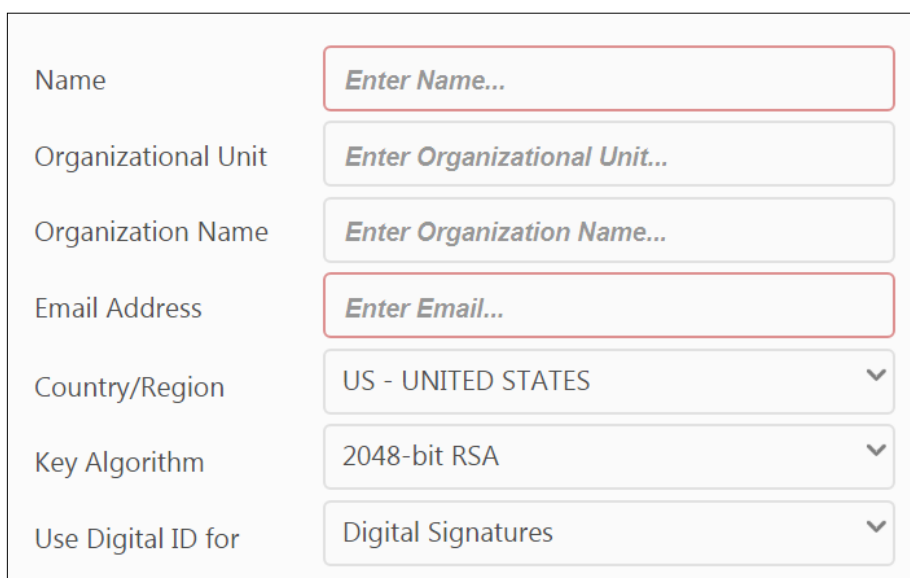
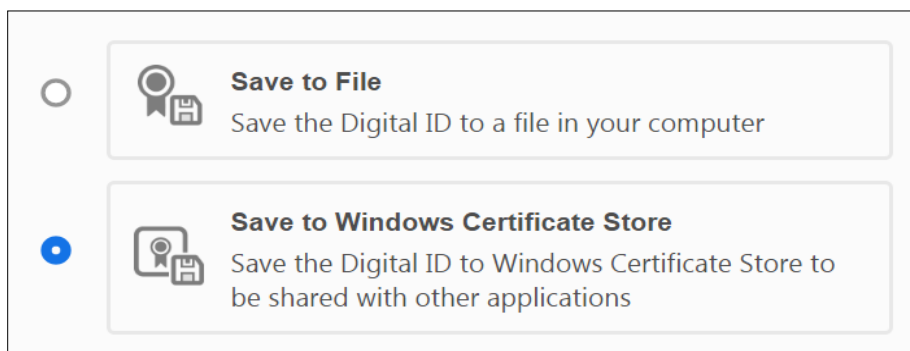
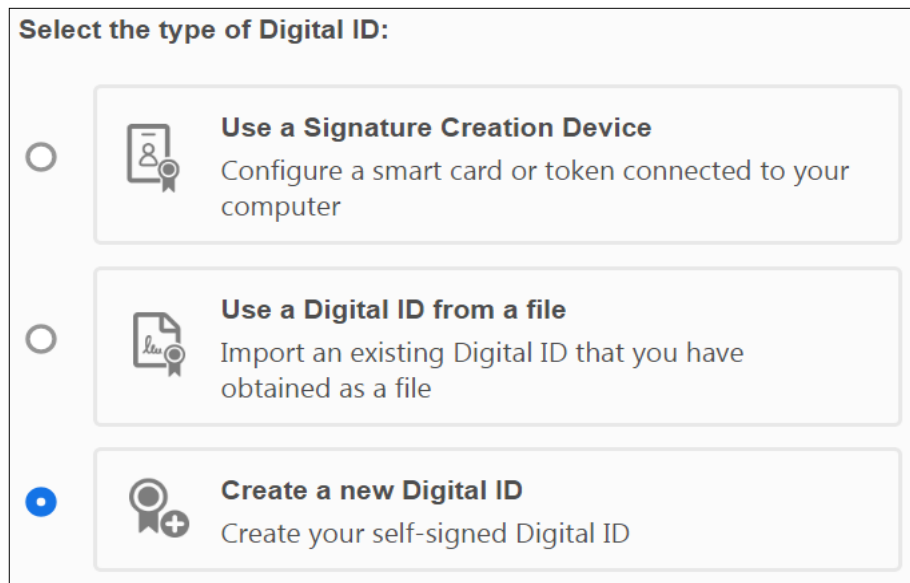
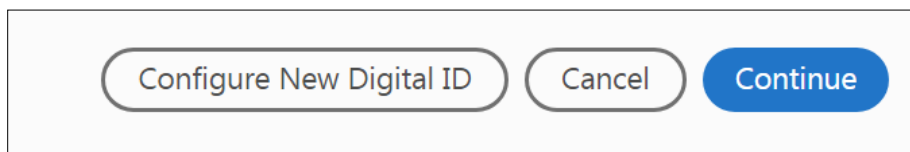
Click **“Save to Windows Certificate Store”**

Fill in Appropriate Boxes

Click **“SAVE”**

It will ask you to save the document to your computer. Then click **“Sign”**

Next time you need to use a digital signature, just choose the signature from the list, and click **“Sign”**



Parliamentary Procedure

What is Parliamentary Procedure?

It is a set of rules for conduct at meetings. It allows everyone to be heard and to make decisions without confusion.

Parliamentary Procedure originated in the early English Parliament. These were discussions of public affairs. The first settlers brought it to America and it became uniform in 1876 when Henry M. Robert published his manual, *Robert's Rules of Order* on Parliamentary Law.

Today *Robert's Rules of Order Newly Revised* is the basic handbook of operation for most clubs, organizations and organized groups. Soroptimist International follows *Robert's Rules of Order Newly Revised* in conducting all general business meetings and Board of Directors' meetings.

Why is Parliamentary Procedure Important?

Because it is a time-tested method of conducting business at meetings and public gatherings. It can be adapted to fit the needs of any organization and allows everyone to follow the same basic rules.

Parliamentary Procedure allows:

- Democratic Rule
- Flexibility
- Protection of Rights
- Ensures that everyone has a voice

Meeting Management and Protocol

- Protocol covers the manners and ceremonies used in your club to ensure orderly procedure and reflect the rules of etiquette.
- Attend meetings regularly and be on time.
- Be attentive during meetings and speak only when you have the floor.
- Be courteous and listen to the speaker.
- Address the presiding officer by their title followed by their name, such as "President Violet" or "Vice-President Patti".
- A quorum is necessary for decisions made within the club that require a vote.

Parliamentary Voting Procedures

Eight Steps to Action

1. A member should rise and address the chair.
("President Mary")
2. She should wait for recognition by the chair.
3. She makes the motion.
("I move that" **not** "I make a motion")
4. Another member seconds the motion.
5. The chair states the motion.
("It is moved by _____ and seconded by _____ that...")
6. If the motion is debatable, the chair asks for debate.
("Are you ready for the question?" or "Is there any discussion?")
7. The chair takes the vote.
("The question is on the adoption of the motion to...As many as are in favor of the motion say 'aye'...Those opposed say 'no.'") (If a two-thirds vote is required: "As many as are in favor of the motion, please stand...Be seated. Those opposed, please stand...Be seated.")
8. The chair announces the result.
("The motion is adopted." or "The motion is defeated.")

Amendments

A motion may be amended by any of the following methods:

- to insert;
- to add;
- to strike out;
- to strike out and insert;
- to substitute.

When a motion is amended, the amendment then becomes the main motion and must be acted upon first. An amendment may also be amended. Always remember to work backward when taking the vote:

- amendment to the amendment;
- amendment to the main motion;
- main motion.

Resource – Soroptimist International of the Americas (SIA):

<https://s3.amazonaws.com/soroptimist-media/05-for-members/club-management/parliamentary-procedure-and-sample-business-meeting-agenda.docx>

Soroptimist “Netiquette” and Club Protocol

Soroptimist “Netiquette”

The Golden Rule of “Netiquette” is “remember the human”. When communicating via computer, it is all too easy to forget that those are real people out there with real feelings and egos. It is OK to express your opinions, but be sensitive to the feelings of others.

Knowledge and understanding of “Netiquette” is useful because it explains some of the technical limitations of online communications. It will help you create a positive impression on those you meet in cyberspace; and it explains the conventions already being used by millions of electronic communicators.

General Writing Guidelines

- Always start your email with a greeting. To start with a request or question appears demanding. Feel free to use a greeting that reflects your personality, but to think of your email as a serious communication tool, not an excuse to forget about being courteous or friendly.
- Always end your emails with “Thank you”, “Sincerely”, “Best regards” or another similar closing and your full name, especially if your e-mail address doesn’t make clear who you are.
- Focus on one subject per message and always include a pertinent subject title for the message. Keep paragraphs and messages short and to the point. Always spell check your email, proofread for errors, capitalize your sentences and use appropriate punctuation and grammar.
- Refrain from using multiple !!!!! or ??????. Multiple exclamation points and question marks risk giving the perception that you are sarcastic and condescending.
- You want your emails to be readable. Type in complete sentences. Create new paragraphs when the subject matter shifts. Take the time to review your email before clicking send.
- Typing in all capitals in online communications is equivalent to SHOUTING! Type in all caps only if you really mean to shout. Capitalize words to highlight an important point or to distinguish a title or heading.

Dealing with Offensive Messages

- If you receive a rude email - do not respond immediately - if at all. A flame is a post that expresses a strong opinion or criticism. Flame messages are acceptable when their purpose is to correct misinformation or bad behavior, or to add something of value to the topic at hand. Flames that simply insult others publicly are bad “netiquette”. People are very bold and overly critical on the other side of this screen. They tend to not hesitate to point out things *they think* you need improvement on while not even noticing the good or positive points on the very same issue. Many times these folks are simply trying to get a rise out of you (this is called trolling) all to make themselves feel self-important. If you do not have something nice to say, or at the very least sternly professional - just hit delete.

- Sending email with foul, threatening, or abusive language is crude. This includes obscenities, verbal harassment, threats of slander or personal comments that would prove offensive based on race, religion, or sexual orientation.
- No matter how rude someone may be to you, or how offended you may be by another's opinion, do not lower yourself to their level. Always state your opinion clearly and concisely, without personalizing an issue or resorting to name-calling. Be careful not to read anything into an email that isn't there. There can be heated discussions online. Communicate as an adult. Share your opinions and point of view and realize, that in the grand scheme of things nobody is "better" than anybody else by virtue of their opinions alone.
- If you have mistakenly offended or have misinterpreted what another person wrote, do not hesitate to apologize. That being said, "apologies" which are only offered to produce an opportunity to continue a tirade from a previous email are viewed as self-righteous. Apologies should be offered with sincerity.

Handling Messages

- In general, you should only forward or post an email message that you have received if the author of the message has given you permission to forward it or post it. Some common sense exceptions apply. If there is any information of a personal nature in the email, make sure the author does not object to you sharing the information. Never post a private email message to a news group, bulletin board, or mailing list, without the author's consent.
- Before posting to a discussion group you should find the Frequently Asked Questions (FAQ) document, read the FAQ, and read some of the existing posts to get an idea of the tone and character of the group. This will save you from posting an off-topic message, a silly question, or a question that has already been answered.
- Responding promptly is the courteous thing to do. Think about how quickly you would return a phone call or voice mail. Email is no different. Always respond as soon as you can. If you need more time, (longer than 48 hours) to gather your thoughts, simply send an email stating you are planning on responding in more detail and when.
- Never assume your email messages are private or that only you and the recipient will read them. At the least, system administrators have full privileges to your account.
- Follow chain of command procedures for corresponding with superiors. Do not send a complaint via email directly to the "top" just because you can.
- Always minimize, compress or "zip" large files before sending. People new to the online world do not realize how large some documents, graphics or photo files are. They can be large enough to fill someone's email box and cause their other mail to bounce! Get in the habit of compressing anything over 100,000 bytes. (You can view file sizes in Windows Explorer. Simply right click on the file name and choose properties.) Do not send unannounced large attachments to others because you think that photo or file is cute, cool, or neat. Even when sending business files, always compress and ask permission first.

Above all, share information and help other online beginners.

Soroptimist Club Protocol - Founder Region Club Tips

Communication

- When sending invitations for club fundraisers or awards programs, **always courtesy copy** the District Director.
- Before contacting other clubs to participate in a project, send the proposal to your District Director for approval and guidance.

Fundraisers

- Invite District Director, Region Treasurer, Region Secretary, Region Governor-elect and Governor to fundraisers and events.

Awards Programs and Installations

- Invite District Director, Region Treasurer, Region Secretary, Region Governor-elect and Governor to club awards programs and installations.
- Invite District Director and Governor as **club guests**.
- Seat District Director, Governor and other region officers, if attending, in a place of honor.
- Prior to event, ask District Director or Governor if they would like to speak and allow appropriate time in the program.
- Introduce region officers using order provided below.

Introductions

- City/Government Officials
- Other visiting Soroptimist (other region or federation)
- Past Fellowship President (s)
- Past Governors (s)
- Current Fellowship Director
- Current Fellowship President
- Current visiting District Director (s)
- District Director
- Region Treasurer
- Region Secretary
- Region Governor-elect
- Region Governor (always last)



SIA Proper Soroptimist Custom and Protocol

- Begin and close meetings on time; be on time for meetings.
- Attend regularly.
- Address the presiding officer as president, governor or, if the vice president is presiding, by her title followed by her name, e.g. "Vice President Mary."
- Address another Soroptimist by her first name.
- Do business with Soroptimists on a business basis, expecting no favors or special treatment.
- Pay your own way, unless you're invited as a guest or as a speaker.
- Invite Soroptimists and others (as deemed appropriate by the president) to business meetings.
- Welcome visiting Soroptimists.
- Disagree politely and keep informality within the bounds of fellowship and parliamentary procedure.

Use correct terminology:

- We are Soroptimists — not Sorops.
- We are members — not sisters or girls.
- We are clubs — not chapters.
- We are a federation — not national or federal.
- We have a pledge — not a creed or motto.
- We attend a club or district meeting, region conference, federation or international convention.
- We elect region officers — not regional officers.
- We believe in Soroptimist — not "Soroptimism."

Use correct names:

- Soroptimist International of (name of your club)
- Soroptimist International of the Americas
- Soroptimist International of Europe
- Soroptimist International of Great Britain and Ireland
- Soroptimist International of the South West Pacific
- Soroptimist International

Protocol promotes orderly procedures. Personal friendships, likes and dislikes cannot matter in official life.

Always remember that you honor the office a person holds...not the person.

For more information regarding Soroptimist Protocol follow the link below:

<https://soroptimist.imgix.net/05-for-members/club-management/soroptimist-protocol.pdf>

Soroptimist Terms, Programs & Definitions

Attendance	As written in the Soroptimist International of the Americas Bylaws, Section 5.02 Entitlements: (a) all members whose participation meets the requirements set by the club bylaws may hold office, speak, make motions, and vote. Clubs shall not require attendance at meeting as a condition of retaining membership in the club.
Certificate of Appreciation	Replaces the Club Award effective with the 2014-2015 club year. The Certificate of Appreciation is given to clubs based on information already available at SIAHQ including participation in the Live Your Dream Awards, giving 10% of funds raised locally to Club Giving and maintaining or increasing membership. Clubs do not need to apply for the certificate.
Classification	Classification of members is no longer required (see Soroptimist International of the Americas Bylaws, Section 5.01 Eligibility and Member Types).
Club Roadmap For Success	A guide to help clubs understand their role in achieving the goals of the SIA Strategic Plan: https://soroptimist.imgix.net/05-for-members/club-management/roadmap-e.pdf
Committees	It is through committees that the activities of the organization are planned and accomplished. Committees are at all levels of the organization from the club to international. Volunteering to serve on a committee will increase your knowledge of the organization and develop your leadership skills.
Convention	The biennial meeting of Soroptimist International of the Americas that is usually held in July in even-numbered years. The quadrennial meeting of Soroptimist International that is usually held in July of an odd-numbered year.
Conference	The annual business meeting of a region. The Founder Region Conference is held the first weekend in May, which does not include Mother's Day.
Club Email	Club email addresses are an important part of Soroptimist International of the Americas (SIA) communication strategy, both internally and externally, to provide access while protecting individual member's privacy.
Club Giving	Club Giving is a recognition program for clubs that contribute money raised from their local fundraising efforts to support federation programs. Clubs have a long history of helping to fund federation programs and Club Giving is an opportunity for each club to contribute to Soroptimist programs that reach beyond their own community. Through federation programs, clubs can take collective pride in improving the lives of women and girls throughout the world. The Founder Region goal is for all clubs to contribute 10% of their funds raised to Club Giving. https://www.soroptimist.org/for-clubs-and-members/donate/club-gifts/index.html
December 10 th President's Appeal	Every year, the Soroptimist International President will develop an advocacy platform for the December 10th President's Appeal highlighting how education, empowerment, and enabling opportunities can transform the lives of women and girls.

Delegates	At district meetings and region conferences, each club should have three delegates. The delegates shall be three regular members. Delegates represent their club and are given the responsibility of voting on behalf of the members, speaking their concerns and reporting back (verbally and in writing) complete information concerning all Soroptimist matters.
Disaster Relief	Soroptimist clubs support women and girls rebuilding their lives following disasters. Applications for grants are accepted March 1 each year through the Soroptimist Club Grants for Women and Girls.
District Meeting	The District Meeting is an opportunity to educate members regarding International, Federation, and Region Programs and activities. The inspiration and direction is given by the district director and the region board to assist the clubs in implementation of Soroptimist Programs.
Dream It, Be It (DIBI)	<p>Dream It, Be It: Career Support for Girls was launched in 2014 as the new girl program for Soroptimist. It is designed to help girls grow up to be strong, successful, happy adults. 'Dream It, Be It' targets girls in secondary school who face obstacles to their future success. It provides girls with access to professional role models, career education and the resources to live their dreams.</p> <p>https://www.soroptimist.org/for-clubs-and-members/program-resources/dream-it-be-it-club-resources/index.html</p>
Federation	A term denoting one of the four geographical areas that make up Soroptimist International. Founder Region is part of Soroptimist International of the Americas (SIA). The other federations include: Soroptimist International of Europe (SIE), Soroptimist International of Great Britain & Ireland (SIGBI) and Soroptimist International of the South West Pacific (SISWP).
Fellow	Individuals and clubs who donate \$1,000 or more to Founder Region Fellowship are honored with the designation "Fellow".
Fellowship, Inc.	The identifying service project of Founder Region. The specific purpose of "Fellowship" is to provide financial grants-in-aid to deserving women candidates who are in the final phase of their pursuit of a doctoral degree from a recognized learning institution within the boundaries of Founder Region. Candidates must demonstrate financial need and scholarly potential. Fellowship is funded by an annual \$2.00 per member mandatory fee, by gifts in memoriam and by the Fellows program. All clubs of the region shall be voting members of the corporation with three votes per club. A board of directors shall be elected biennially. The governor-elect shall appoint the president in the second year of the biennium. The Fellowship program began in 1948.
Financial Transaction Form	<p>The Financial Transaction Form is a two page document used to send all financial contributions (dues, Club Giving, Laurel Society, etc.) to Soroptimist International of the Americas Headquarters. https://soroptimist.imgix.net/05-for-members/club-management/financialtransactionform.pdf</p> <p>Online Giving Form https://secure.etransfer.com/EFT/custom/Soroptimist/donation480/donation1.cfm?d2org=Soroptimist&d2tool=donate</p>

Founders Pennies	Founders Pennies is an annual contribution to Soroptimist International of the Americas based on six cents per member times the number of years since the founding of Soroptimist in 1921. https://www.soroptimist.org/for-clubs-and-members/donate/club-gifts/founders-pennies-faq.html
Friendship Links	Clubs develop a relationship with a club in a different federation to share ideas, projects and correspondence.
Fundraising Council	The Fundraising Council is charged by the SIA Board to solicit and attract charitable donations, gifts, sponsorships and bequests in order to support the programs of Soroptimist International of the Americas, and to provide recommendations regarding fundraising in support of the Board's fiduciary responsibilities.
Induction	A ceremony that formally brings a person into membership in Soroptimist.
Installation	The ceremony that formally places newly elected members into office.
Laurel Legacy	By making a planned gift to Soroptimist in your will or trust, you will join an elite group of women in the Laurel Legacy and help ensure long-term viability of the Soroptimist International of the America's programs. SIA recognizes and honors the generosity of those whose future gifts preserve the strength of the organization, and help women and girls to live their dreams. https://www.soroptimist.org/for-clubs-and-members/donate/laurel-legacy.html
Laurel Society	A recognition program for individuals who have donated \$1,000 or more (at several levels) to support Soroptimist International of the Americas programs. The "Soroptimist Stargazers – Monthly Giving Program" is available for individuals to work towards a Laurel Society membership on a monthly giving basis. https://www.soroptimist.org/for-clubs-and-members/donate/individual-gifts.html
Live Your Dream Award (LYD)	The Live Your Dream: Education and Training Awards for Women is the identifying project for SIA. The program (LYD) was established in 1972 to assist women with primary financial responsibility for their families to obtain the skills-training and education necessary to improve their employment status and standard of living for themselves and their family. Each year, more than \$2.6 million in club, region and federation funds are awarded to nearly 1,600 women in SIA's 21 member countries and territories. The women receiving these financial awards may use them for any costs associated with their educational efforts, including tuition, books, child care, and transportation. The program begins on the club level, with club recipients becoming eligible for region-level awards. Founder Region strives to continue having 100% participation of all clubs in giving a Live Your Dream Award to deserving women. https://www.soroptimist.org/for-clubs-and-members/program-resources/lyd-awards-club-resources/index.html
LiveYour Dream.org	An online community empowering offline volunteer action. The self-motivated network is made up of people who wish to support women and girls in their quest to lead better lives, while gaining inspiration in their own lives. Members of the free online

community work on topics such as women's economic empowerment, ending violence against women, human trafficking, and more. They also have access to inspirational articles, tips and blogs that can help them live their own personal dreams. www.liveyourdream.org

Member	Regardless of membership type, each person that has joined a Soroptimist club, attends meetings, serves on committees and pays their dues and fees to the organization as agreed, is a member.
Membership Types	There are two types of memberships: (a) Regular members – individuals who support SIA's vision, mission, and core values. (b) Life members - Those members who also support the vision, mission and core values of Soroptimist but met the definitions of the "active life" or "retired life" types of membership as described in the 1999 bylaws and who were designated Life Members by the Federation prior to July 1, 2001, and shall, if they choose, retain this type of membership for their lifetime.
Memorial Grove	The Redwood Memorial Grove became a region project that was initiated and completed during the 1946-1948 biennium. During the 1954-1956 biennium, the first memorial service was held at the Redwood Grove. In June, 1971 Soroptimist and friends witnessed the dedication of a redwood tree as a living memorial to honor the charter president Violet Richardson Ward. A memorial service is held annually, the second Sunday of June at Prairie Creek National Park, in Humboldt County. All club members are encouraged to attend.
Motion Form	The form used to provide accurate wording for a motion at club business and/or board meetings.
Name Badge	Your name badge is to be worn on the right side where it is more easily read. It should be worn to all club meetings and other Soroptimist events.
Program Chair	The program chair member (usually the governor-elect) oversees, coordinates and promotes programs of Soroptimist International of the Americas within Founder Region.
Region Awards	<p>Julia "Bess" Combs Membership Increase Award is given to the club having the largest net growth in regular membership during the year from April 1 through March 31. This net growth is not to include that of a newly chartered Soroptimist club.</p> <p>Barbara Stevenson "S" Club Award is given to honor outstanding high school senior members of "S" Clubs in Founder Region.</p> <p>Power of 8 Award, established in 2014, is given to clubs who have maintained 90%+ of their members for the year from April 1 through March 31. Recognition is given at District Meetings.</p>
Ruby Award	The Soroptimist Ruby Award: for Women Helping Women honors the first federation president, Ruby Lee Minar. A ruby is also a deep red gemstone associated with wisdom, importance, vitality, strength, vivacity, power and love: all words embodying the strong, compassionate women who are our award recipients. This award recognizes women who have worked to improve the lives of women and girls through their profession and/or volunteer work. http://www.si-founderregion.org/ruby-award.html

“S” Club	At the 1958 SIA convention, formation of “S” Clubs was authorized. The first “S” Club was chartered in 1960 at Alameda High School and was sponsored by Soroptimist International of Alameda. A “S” Club is a group of students in grades 7 to 12, who wish to serve their school and community by working on service projects usually in conjunction with their sponsoring club. “S” Club membership also offers leadership and personal growth opportunities to these students.
“S” Club Grants	Grants to help clubs get started or for specific projects are available to “S” Clubs from Founder Region. The applications are located on the Founder Region website. https://www.si-founderregion.org/s-club-information.html
SI	An abbreviation for Soroptimist International.
SIA	An abbreviation for Soroptimist International of the Americas.
SIAHQ	An abbreviation for Soroptimist International of the Americas Headquarters. Email: siahq@soroptimist.org
Sigma Society	In 1966, SIA established the Sigma Society, providing Soroptimist the opportunity to mentor college-age women and to instill within them a desire for volunteerism. College women face unique gender bias, discrimination and challenges as they grow up and enter the working world. Mentoring women through the sponsorship of a Sigma Society, enables Soroptimist to impart invaluable support and guidance, while providing growth and leadership opportunities.
Soroptimist Pin	Soroptimist pins are to be worn on the left side over the heart to all club meetings and other Soroptimist events. It is recommended that members wear their pins all day on meeting days, as well as when they travel, as an opportunity to promote Soroptimist whenever and wherever possible. Members may choose to continue to wear the SI emblem pin and are encouraged to move to wearing the New Member “S” logo pin - #109, available from the SIA store and recommended by SIA. https://www.soroptimist.org/for-clubs-and-members/shop/index.html
Soroptimist Club President’s Pin	SIA has designed a new Soroptimist Club President’s Pin, #110A, which is available available from the SIA store.
Soroptimist Club Past President’s Pin	SIA has designed a new Soroptimist Club Past President’s Pin, #110B, which is available from the SIA store.
Stargazer	The “Soroptimist Stargazers – Monthly Giving Program” is available for individuals to work towards a Laurel Society membership on a monthly giving basis. https://www.soroptimist.org/for-clubs-and-members/donate/individual-gifts.html

Strategic Plan	Soroptimist International of the Americas model for clubs which defines the vision, mission, purpose and core values of the Federation. The plan - Shaping the Future of Soroptimist through Increased Collective Impact - identifies outcomes in four areas known as Pillars for Success : Program, Membership, Public Awareness and Fundraising.
Soroptimists Celebrating Success Awards	Soroptimists Celebrating Success Awards recognizes outstanding club projects that improve the lives of women and girls in local communities or throughout the world or promotes Soroptimist as an organization that improves the lives of women and girls. These awards recognize the best practices of Soroptimist clubs in each of the four areas of the SIA strategic plan: fundraising, membership, program and public awareness. The applications are due each year on or before July 1, and are submitted to the Region Soroptimists Celebrating Success Chair. https://soroptimist.imgix.net/05-for-members/club-management/forms/scsa-club-instructions-entry-form.pdf
Soroptimist Club Grants	The Soroptimist Club Grants for Women and Girls are funds given to Soroptimist clubs to start or continue projects in their communities that improve the lives of women and girls, in accordance with the mission of SIA. The deadline to apply is annually on March 1. https://www.soroptimist.org/for-clubs-and-members/program-resources/soroptimist-club-grants-for-women-and-girls.html
Violet Richardson Ward	Violet Richardson Ward was one of the first eighty women that were the charter members of the “Soroptimist Association” in 1921. She became the charter president of the organization upon its chartering, October 3, 1921 in Oakland, California. Violet was a physical education teacher in the Berkeley School District and an inspiration to many of the early members. Her motto was “It’s what you do that counts”.
Violet Richardson Award (VRA)	The Violet Richardson Award is a recognition program for young women engaged in volunteer action within their communities or schools. The award is given to young women (between ages 14-18) whose activities make their community and our world a better place. Effective in 2014, the Federation no longer provides a federation-level award. Founder Region still administers the program and clubs in Founder Region are encouraged to continue giving the award. http://www.si-founderregion.org/violet-richardson-award.html
Websites	Founder Region - http://www.si-founderregion.org Soroptimist International of the Americas - http://www.soroptimist.org Soroptimist International - http://www.soroptimistinternational.org
Working With Youth	Procedures have been developed to support your club in conducting programs in a safe and secure environment for participating youth. Access the resources available for programs involving youth by following this link to the SIA website. https://www.soroptimist.org/for-clubs-and-members/program-resources/dream-it-be-it-club-resources/procedures-for-working-with-youth.html

Notes: