

**2022**

**Founder Region**

Soroptimist International of the Americas

# LEADERSHIP

Club / Officer / Committees / Member



SOROPTIMIST®

**Investing in Dreams**

# Table of Contents

---

Introduction .....	3
Soroptimist History .....	4
Who We Are .....	4
Who and Where We Are .....	6
International .....	6
Federation .....	6
Region .....	6
Districts .....	6
Clubs .....	6
Membership .....	7
Why We Do What We Do .....	7
What We Do .....	8
Mission Statement .....	8
Core Values .....	8
Programs & Projects .....	8
Soroptimist International (SI) .....	8
Soroptimist International of the Americas (SIA) .....	9
Live Your Dream Award: Education and Training Awards for Women .....	9
Dream Big Campaign .....	9
Dream It, Be It: Career Support for Girls .....	9
LiveYourDream.org .....	9
Founder Region Programs and Awards .....	10
Founder Region Project - Fellowship .....	10
Violet Richardson Award .....	10
Barbara Stevenson "S" Club Award .....	10
Julia "Bess" Combs Membership Increase Award .....	10
"Power of 8" Membership Retention Award .....	11
Club Programs and Projects .....	11
Club Officer Responsibilities and Guidelines .....	12
PRESIDENTS .....	13
Meeting Management and Protocol .....	16
Transition Checklist for Outgoing Presidents .....	17

VICE PRESIDENT / PRESIDENT-ELECT .....	18
Speaker/Programs.....	18
Ways and Means/Fundraising .....	19
SECRETARY .....	20
TREASURER.....	22
DIRECTOR(S) .....	23
Club Operation Guidelines.....	24
CLUB DELEGATES.....	24
PARLIMENTARIAN .....	25
COMMITTEES.....	25
MEMBERSHIP RESPONSIBILITIES .....	27
Nominations & Elections.....	28
Parliamentary Procedure.....	29
Parliamentary Protocol.....	29
Parliamentary Voting Procedures.....	31
Amendments .....	31
Technology Tips .....	32
Using Your Soroptimist Club Email Account .....	32
Instructions for Using Writable PDF Documents .....	33
How to convert your PDF flyer to picture to post on Facebook .....	33
Microsoft “Snipping Tool” .....	34
Creating a Digital Signature .....	35
Cybercrime – Keeping You Safe Online .....	36
Recognition & Branding Tools.....	37
Digital toolkit .....	37
Soroptimist “Netiquette” and Club Protocol .....	37
Founder Region Club Protocol Tips.....	40
Quick Links .....	45
President Resources .....	45
Secretary Resources .....	45
Treasurer Resources .....	45
Pillar Resources .....	45
Soroptimist Glossary and Terms .....	46
Founder Region Website Cheat Sheet.....	51

# 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 2020-2022 Founder Region Board**

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

## **The 2022-2024 Founder Region Board**

Governor Vicki Ham  
Governor-elect Elise Balgley  
Secretary Kristal Koga  
Treasurer Tess Albin-Smith  
District I Director Lenore Colarusso  
District II Director Jackie DeVries  
District III Director Colleen Ganaye  
District IV Director Elaine Reed  
District V Director Teri Lynn Sato

## 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 because 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

---

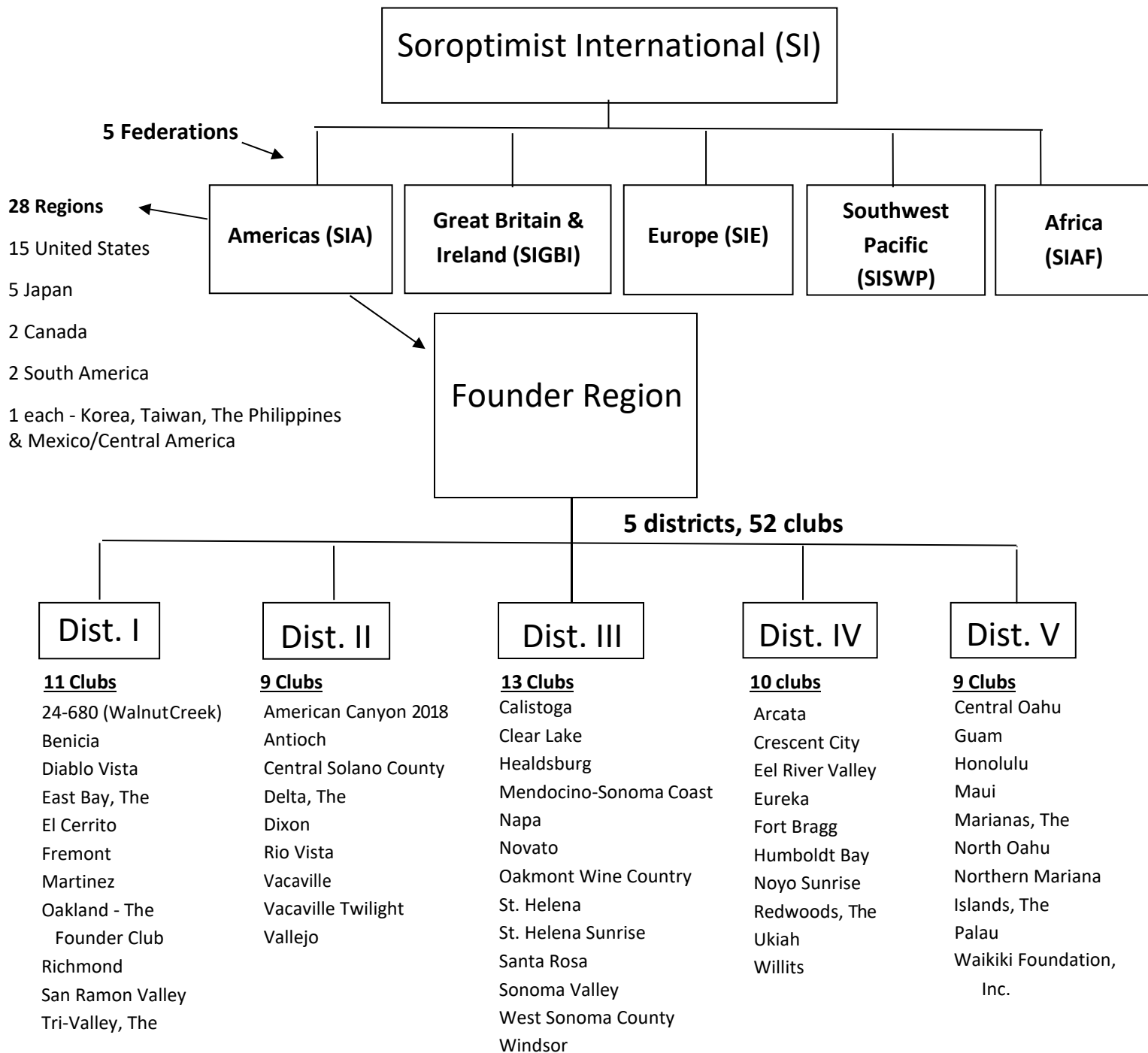
Soroptimist is a global volunteer organization that provides women and girls with access to the education and training they need to achieve economic empowerment. Over 72,000 Soroptimists in 121 countries and territories support community-based and global projects benefiting women and girls. Our organization 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.

**Resources:**

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

## Who and Where We Are – Flow Chart



# Who and Where We Are

---

## International

Soroptimist International is the umbrella organization made up of the five 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 five federations.

[www.soroptimistinternational.org](http://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](http://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](http://www.si-founderregion.org)



## Districts

Founder Region currently consists of five districts, referred to as Districts I, II, III, IV, and V. A realignment was approved to reduce the number of districts from six 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 Commonwealth of 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 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. 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 is a global volunteer organization that provides women and girls with access to the education and training they need to achieve economic empowerment.

## Core Values

Gender Equality, Empowerment, Education, Diversity & Fellowship

# Programs & Projects

---

## Soroptimist International (SI)

Their mission is Soroptimists transform the lives and status of women and girls through education, empowerment and enabling opportunities. Educate, Empower & Enable.

### United Nations

Soroptimist International advocates for human rights and gender equality through education and empowerment. At the heart of Soroptimist International's advocacy is its work across seven United Nations Centers, in which twenty-one Representatives ensure that the voices of women and girls around the world are included in international decision making. The 7 centers are New York, Geneva, Vienna, Rome, Paris, Nairobi, & Bangkok.

### December 10<sup>th</sup> President's Appeal.

Each year the International President determines a project, and it is called the December 10<sup>th</sup> President's Appeal. **Opening Doors to a Bright Future**, 2021-2023, springs from the learning and successes of many of the SI Appeals that have gone before; uniting Soroptimists, Clubs, Unions and the five Federations, with the aim of delivering tangible benefits to some of the world's most marginalized women, girls, and their communities. With plans to establish Appeal projects in each of the five Soroptimist Federations, the launch project will take place within the Federation of the South West Pacific, in the South East Asia Nation of Cambodia.



*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) to accommodate foreign currency exchange.*

Resource – Soroptimist International (SI):

<https://www.soroptimistinternational.org/action/international-presidents-appeals/>

## Soroptimist International of the Americas (SIA)

### Live Your Dream Award: Education and Training Awards for Women

The Live Your Dream Award is Soroptimist International of the Americas signature program and participation 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. 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 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 to impact more women, provide support other than cash awards (such as mentoring), and remain in contact with their award winners and support them for the long-term.



Over half of our Live Your Dream Awards recipients are survivors of domestic violence, trafficking, or sexual assault. Nearly all the women and families we serve have overcome enormous obstacles including poverty, teen pregnancy, and drug or alcohol addiction.

### Dream It, Be It: Career Support for Girls

Dream It, Be It was launched in July 2014. This 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.



### LiveYourDream.org

[LiveYourDream.org](http://LiveYourDream.org) is the 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. Clubs are encouraged to invite members, friends, awardees and potential members to participate.



### Dream Big Campaign

Dream Big is a fundraising campaign to help SIA with program delivery, program expansion and program sustainability. For more information, go to [www.dreambig.soroptimist.org](http://www.dreambig.soroptimist.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.*

# Founder Region Programs and Awards

## Founder Region Project - Fellowship

Founder Region Fellowship is a non-profit, incorporated entity within Founder Region of Soroptimist International of the Americas. Fellowship is Founder Region's identifying project. There are elected directors seated as the board, one from each district in the region. The Fellowship President and Fellowship Treasurer are elected positions effective 2022. 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.



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

## Violet Richardson Award

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.



## Barbara Stevenson "S" Club Award

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 an "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 annual Region Conference.



## Julia "Bess" Combs Membership Increase Award

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.

### "Power of 8" Membership Retention Award

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
- 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>

- 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 Officer Responsibilities and Guidelines

---

### **Soroptimist Club Board of Directors**

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 an optional director(s). 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. Refer to your club bylaws for specific details.

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.

[Working As One](#) is a simple and fun exercise created to help clubs fully understand their work. All clubs are invited to examine the projects that take time and resources to ensure they are helping us achieve our Big Goal. After the exercise, use the decision tree to define your next steps.

Additionally, Soroptimist Forward [resources](#) are available to help clubs and regions deliver programs, fundraise, gain recognition, and address member operations and member engagement as we look to reinvent and reimagine how we serve our communities—locally and globally.

#### **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.

## **PRESIDENTS**

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 alerted to changing needs in her/his community and be knowledgeable about region, federation and international aims.

#### **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.

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 agenda on the [SIA website](#) may be revised to accommodate your club's needs.

### *Soroptimist Pledge and Grace*

The Soroptimist Pledge should be recited at the end each club meeting. Many clubs have a tradition of reciting the Soroptimist Grace at the beginning of each meeting as well, but it is completely optional.

#### **Soroptimist Pledge**

I pledge allegiance to Soroptimist  
and to the ideals for which it stands.

The Sincerity of Friendship,  
The Joy of Achievement,  
The Dignity of Service,  
The Integrity of Profession,  
The Love of Country.

I will put forth my greatest effort  
to Promote, Uphold, and Defend these  
Ideals, for a Larger Fellowship in Home,  
in Society, In Business, for Country and for God.

#### **Soroptimist Grace** (optional)

For the bread upon the board,  
make us truly thankful Lord.  
For each person here,  
whom our hearts hold close and dear.  
For this day oh Lord above,  
now accept our grateful love.



## *Flag Protocol*

1. The U.S. flag always leads in a processional or recessional.
2. When the national flag passes by in a parade or in review, all persons should face the flag and stand at attention with the right hand over the heart. After the flag has passed, the hand can be lowered. When the hand is over the heart, the fingers should be together.
3. During the recitation of the pledge of allegiance, the same as #2 above, stand at attention and place hand over heart with fingers together.
4. When displayed on the floor or on a platform, the flag is given the place of honor, always positioned behind the speaker and to the speaker's right, and to the left of the audience. Other flags, if any, are positioned to the right of the U.S. Flag as seen by the audience.
5. Pledge of allegiance to the flag; manner of delivery (U.S. Flag Code)  
[www.usflag.org/uscode36.html](http://www.usflag.org/uscode36.html)

**The Pledge of Allegiance to the Flag:** "I pledge allegiance to the Flag of the United States of America, and to the Republic for which it stands, one Nation under God, indivisible, with liberty and justice for all.", should be rendered by standing at attention facing the flag with the right hand over the heart. When not in uniform men should remove any non-religious headdress with their right hand and hold it at the left shoulder, the hand being over the heart. Persons in uniform should remain silent, face the flag, and render the military salute. Based on this section of the flag code, while not specifically prohibited, clubs are advised to refrain from reciting the Pledge of Allegiance unless a flag is present.

## *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.

## 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 1<sup>st</sup>. 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)@sroptimist.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

The vice president, in the absence of the president, shall perform the duties of the president. If a club has more than one vice president, the vice presidents in the order of their rank shall perform the duties of the president and such additional duties as the club or the board of directors may require. The vice president should assist the president in any way possible. She should familiarize herself with all Soroptimist matters on club, district, region, SIA and SI levels, and attend appropriate functions.

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.

## Speaker/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.

## 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.
- 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 types of events are currently popular:

### **Types of Events**

- ✓ Community events: fairs, home tours, art shows, run/walk
- ✓ 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

## **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 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.

### **General Duties**

In the absence of the president, president-elect, and vice-president(s), the secretary calls meetings to order at the designated time and presides until the election of a temporary chair.

The secretary should bring the following to each business meeting:

- minutes of the previous meeting, as well as minutes of any business conducted at any meeting since the last business meeting (such as a program or special meeting) that have not been approved
- the membership roster
- copies of the club's bylaws and procedures/standing rules, as well as the region and SIA bylaws and procedures
- a list of all committees and their members
- a list (agenda) of all business to come before the meeting, arranged in proper order
- a supply of paper which may be required for ballot voting
- current budget



### *Tips on Writing Minutes – Do This, Not That*

Robert's Rules of Order Newly Revised specifies seven essential matters that must be covered in all minutes:

1. The kind of meeting
2. The name of the group
3. The date and place of the meeting
4. Whether the regular presiding officer and secretary were present, or, in either's absence, the name of the substitute
5. Whether the minutes of the previous meeting were approved
6. All main motions, points of order and appeals – whether sustained or lost – and all other motions that were not lost or withdrawn
7. The hours of the meeting
8. Treasurer's report (balances, etc)
9. Correspondence
10. Old and New Business

#### **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.
- 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.

(Refer to the [Quick Links](#) page for sample minutes & more resources.)

### *Membership Roster*

The secretary (or treasurer in some clubs) should keep an alphabetical, updated membership roster, to determine who is eligible to vote. The treasurer should provide a list of those members who may be disenfranchised because of delinquent dues. Ordinarily, members on leave are not entitled to vote for the duration of the leave.

## TREASURER

The Club Treasurer protects the funds of the club. She is responsible for club financial transactions and records. She provides monthly treasury reports so members know their club's financial status. The treasurer job can be time-consuming so she/he rarely has any other club duties assigned. Some clubs have an assistant treasurer to help. 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. These usually include:

Receive, record and deposit all funds in the financial institution authorized by the board.

- Maintain records of income and expense, and hardcopies of receipts to match.
- Maintain a filing system of receipts and bank statements for easy retrieval.
- Reconcile the bank statements and keep a copy.
- Serve as an advisor to the club finance committee and furnish financial reports as required by the club bylaws and as requested by the board or the club.

- Distribute monthly and annual financial reports 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.)
- Pay 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.
- Place orders for supplies from SIA Headquarters or wherever directed.
- Process "dues" payments and forms for both SIA and FounderRegion.
- Make 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 – annually register with the Attorney General's Registry of Charitable Trusts if conducting a raffle; also, must file annual reports afterward.
- Maintain membership records and report new or dropped members to SIA and Region.
- Arrange for an annual club review of financial records
- Keep track of fundraiser income and expense for club reports.
- Work with the club finance committee to prepare the annual budget.
- Perform any other duties as set forth in the club bylaws.

(Refer to the [Quick Links](#) page for sample budget & [Treasurer Calendar](#) for specific deadlines and links to online resources.

## DIRECTOR(S)

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.

The officers and directors constitute the board of directors. The number of directors and their terms of office may vary at the discretion of the club and should be identified in the club bylaws. The board shall have administrative control over the affairs, funds and property of the club, except that of modifying any action taken by the club. It shall authorize 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; and perform such duties as the club or bylaws may require.

Members of the board are not, however, expected to do all the thinking for the club. It is their responsibility to maintain close contact with members and with community leaders. Such contacts provide a sound basis for identifying the most important needs of the community. The club may decide whether the actions taken by the board should be kept confidential.



# Club Operation Guidelines

---

## CLUB 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.

### **Election**

The club president is always a delegate to the region conference. Other delegates are elected or appointed in accordance with the club bylaws and region bylaws/SIA bylaws. If a vacancy occurs in club representation, the club should select an alternate according to club bylaws.

### **Qualifications**

Members chosen to represent the club should have a working knowledge of Soroptimist laws, region procedures, and the objects and ideals of the organization. Experience as a member of club committees and the club board is helpful.

The ability to work with others and a spirit of goodwill and understanding will help the delegate, the club and the conference body. Delegates represent their club and should take care to know the club's wishes. The position of delegate is not an office; therefore, an officer may serve as a club delegate.

### **Responsibilities**

#### **Before the Conference**

- Be certain credentials have been properly filed.
- Be certain that registration fees and all financial obligations of the club to the region and the SIA have been paid. Only delegates from clubs in good standing may be seated at a region conference or SIA convention.
- Study the Call to Conference.
- The President should:
  - allocate time at a club business meeting for discussion of topics on the agenda so that the delegate(s) may have the benefit of the majority opinion of the club.
  - schedule time at a post-conference/convention meeting for the reports of the delegates—this should be as soon as possible after the conference/convention.

#### **During the Conference**

- Register promptly—be on time and attend all sessions.
- Know the standing rules and observe them.

- When recognized by the presiding officer, give your name and the name of your club.
- Take accurate notes for reporting to the club.

### **After the Conference**

Prepare a report on the meeting. Include the following.

- action or discussion concerning region or SIA bylaws changes, recommendation and resolutions, budget, and other business presented to the voting body, with a brief statement of the reasons for approval or disapproval.
- results of elections.
- the summary of main speeches.
- summaries of main points brought out in the workshops, panels and discussion groups.
- suggestions for improving club administration, and increasing club interest and support in attaining Soroptimist goals.
- a brief summary of social activities.

## PARLIAMENTARIAN

The club president may appoint the parliamentarian. She is never elected. She should have a good understanding of Robert's Rules of Order Newly Revised.

- It is the duty of the parliamentarian, when requested, to advise the president on parliamentary law. She does not have the right to express an opinion unless she is asked to do so by the presiding officer.
- The parliamentarian gives an opinion, but a ruling is made by the presiding officer.
- A Soroptimist, serving as a parliamentarian at a club meeting, may retain her vote as a member.

## 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.

The 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](#).
- Review roster for hidden talents
- President serves as an ex-officio member of every committee except the nominating committee
- The treasurer should serve as an ex-officio 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 Soroptimists 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**:
 

○ <b>T</b>	Is it	<b>TRUE</b>
○ <b>H</b>	Is it	<b>HELPFUL</b>
○ <b>I</b>	Is it	<b>INSPIRING</b>
○ <b>N</b>	Is it	<b>NECESSARY</b>
○ <b>K</b>	Is it	<b>KIND</b>

### *Proper Functioning of a Committee*

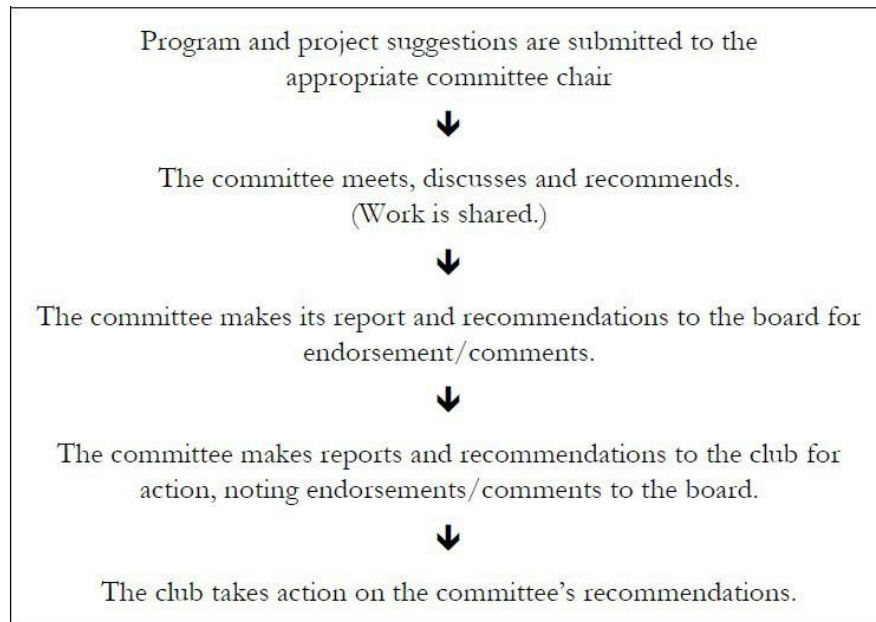
Within 30 days after her appointment, each chair shall call a meeting of her committee to prepare a plan and a budget (if necessary) for the year. She shall make such reports as the club members, president, the board of directors and the club procedures may require. The committee budget, if any, is submitted to the president for club approval.

- The chair gives ample notice to each member when calling a meeting of her committee.
- The chair conducts the meeting and is free to present her own ideas, but each committee member must be given an opportunity to participate.
- A record of the meeting should be kept, and committee recommendations should be written and given to the president.

## Proper Channeling

Each committee is appointed to perform certain functions and should be given the opportunity to do so. Members should never bypass a committee.

- The following procedures should be used:



## 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.

## MEMBERSHIP RESPONSIBILITIES

- DO obtain the floor before speaking. Stand or raise hand and wait to be recognized.
- DO avoid speaking upon any matter until it is properly brought before the assembly by a motion.
- DO keep up on the question being discussed.
- DO yield the floor to calls for order.
- DO abstain from all personalities in debate.

- DO avoid disturbing, in any way, speakers.
- DON'T be late for meetings and DON'T leave a meeting unless necessary until the president declares the meeting adjourned. You may be needed for the quorum or something very important may come up.
- DON'T say "I move to" or "I make a motion to". Say, "I move (state your motion clearly)".
- DON'T fail to take part in debate if you have a viewpoint to express or want information or parliamentary assistance.
- DON'T wait to obtain the floor in order to second a motion.
- DON'T claim the floor a second time if there are others who wish to speak for the first time.
- DON'T be silent during the debate and then criticize after the meeting.
- DON'T speak on the motion while the vote is being counted or taken.
- DON'T carry on a conversation with your neighbor while someone is speaking.
- DON'T forget to notify a chair of a committee if you are going to be unable to attend a meeting.
- DON'T accept an office unless you are willing to assume the responsibilities of that office.

## Nominations & Elections

---

Club bylaws provide the procedure for nominations and elections. The election of officers should also be in accordance with the general procedures set forth in *Robert's Rules of Order Newly Revised*.

The following is an outline of the order of election followed by many clubs:

1. After the reports of the secretary(s) and treasurer, the president asks for a motion to suspend the regular order of business and proceed with the election of officers.
2. The nominating committee report is requested. At the conclusion of the report, the president repeats the list of nominees presented by the committee and then asks for nominations from the floor for each office individually, allowing sufficient time for names to be proposed. Any nominations so made need not be seconded, nor is a motion to close the nominations necessary. A motion is not needed to accept the nominating committee report. After all nominations are completed, the president declares the nominations closed.
3. The secretary provides a list of those members eligible to vote.
4. The president appoints a teller(s).
5. The teller(s) attend the ballot box and the teller(s) check the name of each individual as votes are cast.

6. After the president ascertains all who are eligible and wish to vote have voted, the president declares the polls are closed and requests the tellers to count the ballots.
7. The regular order of business is resumed until the tellers return.
8. The chairman of the tellers reports to the president the total votes and the number of votes received by each candidate. The president declares each individual elected to office.

## 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

## Parliamentary Protocol

### **PRESIDING OFFICER:**

- It is your responsibility to keep order and expedite business. Start the meeting on time. If no quorum is present, business will then be held over until a quorum is present.
- The treasurer's report is never accepted. Ask if there are any questions and then place it on file for audit. The audit report is accepted.

- The chair is entitled to vote when the vote is by ballot. The chair may vote to break a tie or to create one but cannot be compelled to do so.
- DO state the method of voting (aye and no, show of hands, ballot).
- DO state whether the motion is carried or lost.
- DO request all remarks be addressed to and through the chair.
- DO know where to find the answers quickly when necessary.
- DO devote some time at every meeting for membership input.
- DON'T stand during debate or when a report is being given.
- DON'T take part in debate while you are in the chair. If you must speak, turn the chair over to the (first) vice president. Do not return to the chair until the vote has been taken.
- DON'T be rushed into hasty decisions; take time to become informed.
- DON'T lose your calmness, objectivity, or impartiality.
- DON'T forget to relax and enjoy your leadership. The membership will respond favorably to your attitude.

### **MEMBERSHIP RIGHTS:**

- To offer any motion that is germane to the organization.
- To explain or address that motion or any matter properly brought before the assembly.
- To "call to order" if necessary. A point of order can interrupt a speaker. "Call to order" is raised to ensure orderly procedure, particularly when there is a breach or violation of rules or bylaws, or when a member is not speaking on the motion before the assembly.
- To hold the floor, when legally obtained, until through speaking.

### **THINGS TO REMEMBER:**

- A motion may be amended by the following methods: to insert, to add, to strike out, to strike and insert, and to substitute.
- To stop discussion, rise and state, "I move the previous question." You cannot interrupt someone who already has the floor with this motion. This motion is then voted upon to actually stop debate in order that the motion can be voted on. This motion needs a second and a two-thirds vote for approval.
- If you have a question on the resolution, motion, or debate, rise and state "I have a point of inquiry."
- The maker of a motion may vote against the motion. The maker of a motion may not speak against the motion but can withdraw their motion.
- A "second" means only that the motion is worthy of discussion. Secunder may not be in favor of the motion, and seconds in order for the discussion to be in order. Secunder may speak against the motion and may vote against the motion.
- A motion cannot "die" for lack of a second. If a motion is not seconded, it is not before the assembly.
- A two-thirds vote is required if a motion takes away a right.

- Remember, consideration and courtesy plus absolute impartiality on the part of the presiding officer is a must in conducting a meeting. Parliamentary law is based on the careful balance of the rights of people. Members have the right to speak their opinion on the floor whether or not their opinion is that of the majority.

## 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>

## 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. One way to ensure these emails are read is to auto-forward the Soroptimist mail to the club president or secretary or a responsible club member. This option is addressed below under the heading “Forwarding Club Email...”

Instructions for how to use this email account and how to use the Guide to Office365 Club Email are on the SIA website.

#### Signing in and Accessing Office365 Club Email

To access your email account, you will first need your 6-digit club ID number. If you don't know the club number, you can find it on the Region Website on the [Region Roster](#) under Clubs.

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)
5. Now that you are at your email inbox, you may wish to bookmark that page (click the star next to the web address) so you can find it again.

#### Forwarding Club Email to Another Email Address

1. Open your email inbox. 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 “shortcut 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 from a personal account (if you are forwarding to that 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 PDF documents have “form-fields” so one can type information right onto the document. If a document is a writable PDF, the form-fields usually are blank spaces with blue shading. If you don’t see the blue shading, you might turn it on. Go to the menu above, click Edit, preferences, forms, highlight color, and make sure the “show hover color” box is checked.

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 may not stay if you try to email to someone.
- Open the writable PDF file you just saved onto your computer.
- Type in the correct information.
- Save again so information stays in document. Now it’s ready for emailing as an attachment.

## How to convert your PDF flyer to picture to post on Facebook

Facebook does not import adobe pdfs, but it does work with pictures. To convert an adobe poster or flyer to a picture there are several methods. The easiest is to save the pdf document as jpeg or png or other picture extension.

## Convert PDF to JPEG using Acrobat

- Open the PDF in Acrobat Reader.
- Click the Export PDF tool in the right pane.
- Choose Image as your export format, and then choose JPEG.
- Click Export. The “Save As” dialog box is displayed.
- Select a location where you want to save the file and then click Save.

### **Or in Adobe Acrobat or higher**

- Click “File, Save As”
- Choose the location to save.
- Click on the bottom menu “Save as type” and choose JPEG file (or PNG).

There are other Methods to convert pdfs or online pages on your screen to pictures. These include Using the “print screen” option and the “Snipping” tool.

## Print Screen Option

- Open your document so you can see entire document on the screen without having to scroll up or down.
- Press the Windows button or CTRL with the Prt Sc (Print Screen) button if you have one. If no Prt Sc, you may find it on a function key (press fn and a button with a copy icon). Screenshot will automatically save in the folder named screenshot, but may also be immediately pasted into a word document or a graphic program like Paint and saved for later use.
- Open Facebook and upload the photo file from your computer.

## Microsoft “Snipping Tool”

- To access the Snipping Tool in Windows, hit Start (windows key), type “snipping tool,” and then click the result
- Right-click and choose “Pin to taskbar” or “Pin to Start menu” for easier access in the future.
- Before You Start: Set Snipping Tool’s Options (rectangle, free-from, full screen, window)
- Click “save as” to save as picture or copy & paste into document.

**\*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.**



## Creating a Digital Signature

Open Adobe Acrobat or Reader  
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”** or Save to File and choose a location on your computer you will remember (and the password).

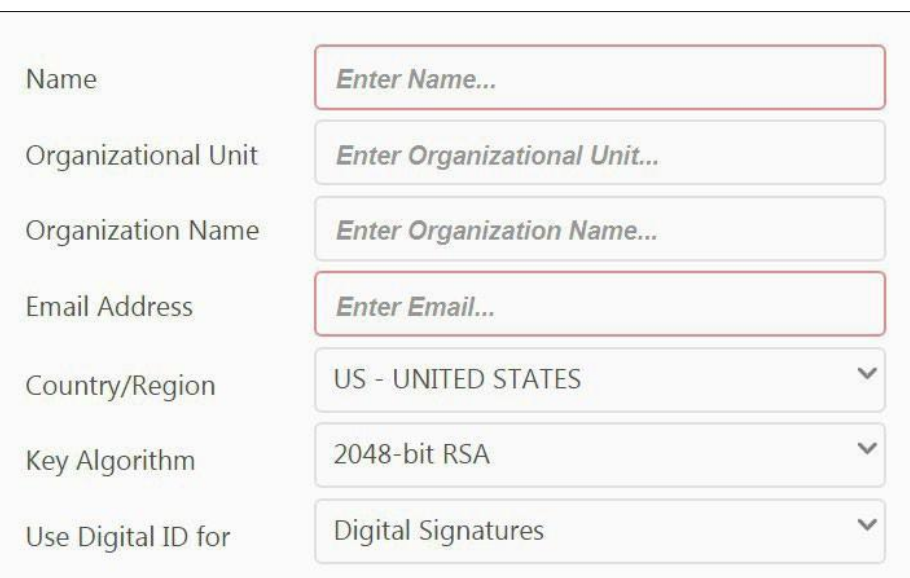
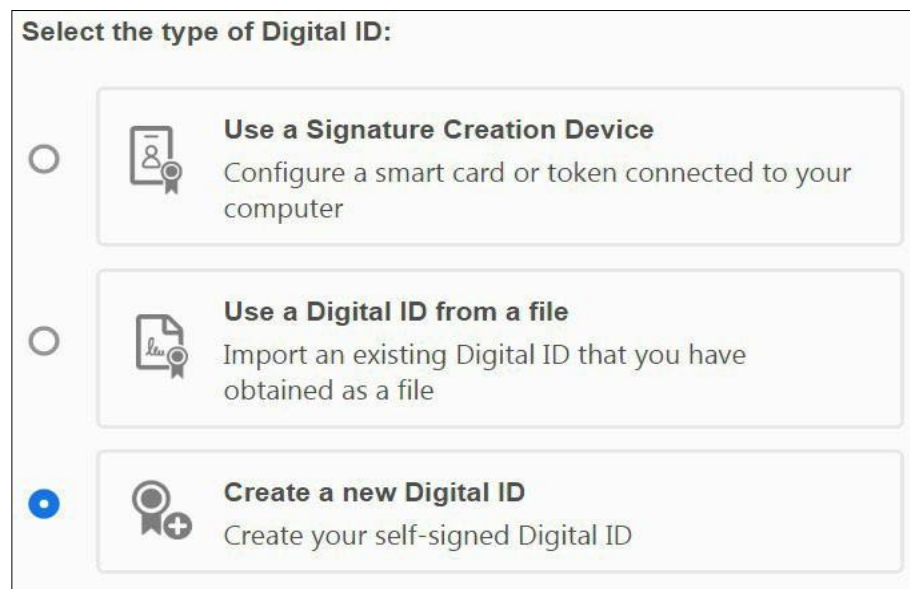
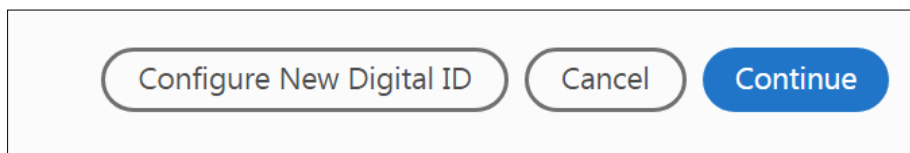
Fill in Appropriate Boxes

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 chose the signature from the list, and click **“Sign”**



## Cybercrime – Keeping You Safe Online

Cybercrime is criminal activity that either targets or uses a computer, a computer network, or a networked device. Most, but not all, cybercrime is committed by cybercriminals or hackers who want to make money. Here are some specific examples of cybercrime:

- Phishing (when spam emails or other forms of communications are sent en masse with the intention of tricking recipients into doing something that undermines their security or the organization they work for - such as the email from your Region Governor asking for money, etc. or PayPal saying your account is closed)
- Email and internet fraud
- Identity fraud (where personal information is stolen and used)
- Theft of financial or credit card payment data
- Cyberextortion (demanding money before or after a threatened attack)
- Malware attacks (when a computer system or network is infected with a computer virus or other type of malware)

### How to Protect Yourself Against Cyber Crime

- **Never open or forward attachments in spam emails.** Clicking on links in spam emails or forwarding such emails can make you and other victims of cybercrime.
- **Use strong passwords,** such as combinations of caps and lower case, numbers and symbols that people will not guess. Do not record them in a file on your computer. Best to use a reputable password manager(most are free) to generate strong passwords randomly to make this easier and it saves your passwords safely – you only need to know one password to open it.
- **Be mindful of which website URLs you visit.** Before clicking on URLs make sure they look legitimate and avoid clicking on links with unfamiliar or those that appear to be spam. Look carefully at the grammar and copycat designs that are a little off.
- **Do not give out personal information unless secure.** Never give out your personal data over the phone or via email unless you are completely sure the line or email is secure. Make certain that you are speaking to the person you think you are.
- **Use anti-virus software and keep it updated.** Anti-virus software allows you to scan, detect and remove threats before they become a problem. If you use anti-virus software, make sure you keep it updated to get the best level of protection. Current windows operating systems come with spam protection which is a good start. Do not turn off your firewall.
- **Keep software and operating system updated.** Keeping your software and operating system up to date ensures that you benefit from the latest security patches to protect your computer.
- **Back-up your data on the cloud** or with an external hard drive in case of a cyber-attack. Do it regularly (once a day, once a week). At least you can find important files and do your best to update from the latest backup.

These tips should help you avoid becoming a victim of cybercrime. However, if you suspect you may be a victim of a cybercrime it is important that you contact your financial institutions (banks and credit card companies) and notify them immediately. The bank can investigate whether they are fraudulent.

## Recognition & Branding Tools

---

We are 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. Refer to the [Branding & Style guide](#) for more information.

### Digital toolkit

The [Digital Toolkit](#) is a starter guide to help you connect with each other in new ways and continue the critical work you do in your communities! The toolkit includes a set of resources to raise awareness about your local impact and global issues; grow your fundraising events and programs; engage in new ways with your fellow members; and continue to make meaningful impact on the lives of the women and girls you serve on a regular basis.

### Social Media

Social Media banners & profile [images](#) are available for all your club social media sites. Sites such as Facebook, Twitter, Instagram & LinkedIn are but a few to advertise your club activities.

### Member Recruitment

Growing strong clubs and increasing our ranks is essential to achieving our mission of improving the lives of women and girls. Soroptimist headquarters offers many resources to help your club with its recruitment efforts.

## 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 protocols 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.



**S O R O P T I M I S T<sup>®</sup>**  


---

**Investing in Dreams**



# Founder Region Club Protocol 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 Customs 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.”**
- When writing club name – SI/insert club name

#### **Use correct names:**

- Soroptimist International of (name of your club).
- Soroptimist International of the Americas (SIA)
- Soroptimist International of Europe (SIE)
- Soroptimist International of Great Britain and Ireland (SIGBI)
- Soroptimist International of the South West Pacific (SISWP)
- Soroptimist International of Africa Federation (SIAF)
- Soroptimist International (SI)

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.

# **SOROPTMIST PROTOCOL**

## *2022-2023 Founder Region Club & President Timeline & Check List*

<b><u>Done</u></b>	<b><u>Date</u></b>	<b><u>Activity</u></b>
<input type="checkbox"/>	1-Jul	Club & Region Officers officially take office
<input type="checkbox"/>	1-Jul	Dues to Federation and Region – Confirm with Treasurer
<input type="checkbox"/>	1-Jul	Form 200 deadline to Federation - Copy to District Director
<input type="checkbox"/>	1-Jul	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"/>	July	Complete the Club Activity Report for your District Director to present at the region board meeting in August.
<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
<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"/>	3-Oct	Founders Day, 1921. (Attend the Virtual 100 Year Celebration Sept. 25 <sup>th</sup> & 26 <sup>th</sup> )
<input type="checkbox"/>	October	Breast Cancer Awareness Month; Domestic Violence Awareness Month
<input type="checkbox"/>	October	Leadership Training District V
<input type="checkbox"/>	October	Complete the Club Activity Report for your District Director to present at the region board meeting in November.
<input type="checkbox"/>	November	Attend Presidents' Roundtable (TBD)

<b><u>Done</u></b>	<b><u>Date</u></b>	<b><u>Activity</u></b>
<input type="checkbox"/>	15-Nov	Live Your Dream Award club deadline for submission of applications
<input type="checkbox"/>	15-Nov	Violet Richardson Award applications due to clubs (suggested date)
<input type="checkbox"/>	15-Nov	Federal and State tax forms must be filed
<input type="checkbox"/>	15-Nov	Proposed changes to Founder Region and Founder Region Fellowship Bylaws Due
<input type="checkbox"/>	25-Nov	International Day for the Elimination of Violence Against Women – “Orange the World” Campaign begins and continues until December 10
<input type="checkbox"/>	1-Dec	Nominations for REGION Nominating Committee positions due to Region Nominating Chair and District Nominating Committee Representative
<input type="checkbox"/>	10-Dec	Soroptimist International (SI) President’s Appeal & UN Human Rights Day
<input type="checkbox"/>	Dec/Jan	Judge Live Your Dream Award applications
<b>2023</b>		
<input type="checkbox"/>	January	Appoint club’s nominating committee
<input type="checkbox"/>	January	Complete the Club Activity Report for your District Director to present at the region board meeting in February.
<input type="checkbox"/>	11-Jan	National Day of Human Trafficking Awareness
<input type="checkbox"/>	February	“Fun for 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"/>	1-Feb	Live Your Dream Award application and transmittal due to District Representative
<input type="checkbox"/>	1-Feb	Violet Richardson Award Club winner application and transmittal due to District Representative
<input type="checkbox"/>	Within 1 month	Dream It, Be It: Career Support for Girls region transmittal form due to Region Chair
<input type="checkbox"/>	15-Feb	Live Your Dream Award district winner applications due to Region Chair
<input type="checkbox"/>	March	Women’s History Month

<b><u>Done</u></b>	<b><u>Date</u></b>	<b><u>Activity</u></b>
<input type="checkbox"/>	1-Mar	Deadline for receipt of Soroptimist Club Grants for Women and Girls applications at SIA Headquarters
<input type="checkbox"/>	8-Mar	International Women's Day
<input type="checkbox"/>	31-Mar	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"/>	July	Complete the Club Activity Report for your District Director to present at the region board meeting in May.
<input type="checkbox"/>	1st 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"/>	31-May	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"/>	1-Jun	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"/>	10-Jun	Leadership Training, Districts IV
<input type="checkbox"/>	11-Jun	Redwood Memorial Grove Service
<input type="checkbox"/>	17-Jun	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

# Quick Links

---

## President Resources

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

Parliamentary Procedure & Sample Agenda: <https://soroptimist.imgix.net/05-for-members/club-management/parliamentary-procedure-and-sample-general-meeting-agenda-e.docx>

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

Sample Club Bylaws: <https://soroptimist.imgix.net/05-for-members/club-management/sampleclubbylaws-e.doc>

## Secretary Resources

Sample Minutes: <https://soroptimist.imgix.net/05-for-members/club-management/sample-business-meeting-minutes.docx>

Sample Board Minutes: <https://soroptimist.imgix.net/05-for-members/club-management/sample-board-meeting-minutes.docx>

## Treasurer Resources

Sample Budget: <https://soroptimist.imgix.net/05-for-members/club-management/club-budget-e.docx>

Club Treasurer Guidelines: <https://soroptimist.imgix.net/05-for-members/club-management/club-treasurer-guidelines-e.docx>

Founder Region Treasurer Forms: <https://si-founderregion.org/resources>

Club Treasurer Calendar: <https://soroptimist.imgix.net/05-for-members/club-management/club-treasurer-calendar-e.docx>

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

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

## Pillar Resources

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

Branding & Logos: <https://www.soroptimist.org/for-clubs-and-members/federation-information/recognition-and-branding-tools/index.html>

Social Media Resources: <https://www.soroptimist.org/for-clubs-and-members/federation-information/recognition-and-branding-tools/social-media-profile-images.html>

# Soroptimist Glossary and Terms

---

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.	
Best for Women Newsletter	Best for Women serves as the organization's fully digital e-newsletter and is the primary communication vehicle for members. It includes communication from leadership, things to know, Dream Program information and more! Each issue is sent to all members in their respective language.	<a href="#">Link</a>
Big Goal Accelerator Projects	Clubs can now report local projects that work only with women & girls facing obstacles, provides access to education and leads to economic empowerment. Must be reported to SIA by June 30 <sup>th</sup> .	<a href="#">Link</a>
Capacity Inventory	Capacity Inventory for Individuals (CII) - A capacity inventory is an indispensable tool for clubs—it helps members to learn about each other's strengths and assets	<a href="#">Link</a>
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: <a href="https://soroptimist.imgix.net/05-for-members/club-management/roadmap-e.pdf">https://soroptimist.imgix.net/05-for-members/club-management/roadmap-e.pdf</a>	<a href="#">Link</a>
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 <b>biennial</b> meeting of <b>Soroptimist International of the Americas</b> that is usually held in July in even-numbered years.	<a href="#">Link</a>
Conference	The <b>quadrennial</b> meeting of <b>Soroptimist International</b> that is usually held in July of an odd-numbered year. 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.	<a href="#">Link</a>
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.	<a href="#">Link</a>
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.	<a href="#">Link</a>

December 10 <sup>th</sup> 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.	<a href="#">Link</a>
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.	
District Meetings	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.	<a href="#">Link</a>
Dream Big Campaign	Dream Big is a fundraising campaign to help SIA with program delivery, program expansion and program sustainability.	<a href="#">Link</a>
Dream It, Be It	Dream It, Be It: Career Support for Girls was launched in 2014 as the new girl (DIBI) 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.	<a href="#">Link</a>
Dream It, Be It Grants	Founder Region offers grants to clubs holding a Dream It, Be It program.	
Federation	A term denoting one of the five 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), Soroptimist International of the African Federation (SIAF)	<a href="#">Link</a>
Fellow	Individuals and clubs who donate \$1,000 or more to Founder Region Fellowship are honored with the designation "Fellow".	<a href="#">Link</a>
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 \$7.00 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 Fellowship program began in 1948.	<a href="#">Link</a>
Financial Transaction Form	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.	<a href="#">Link</a>
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.	<a href="#">Link</a>
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. A 2022-2024 Biennium Induction is available on the “Resources” page under “Membership” on the region website.	<a href="#">Link</a>
Installation	The ceremony that formally places newly elected members into office. Founder Region has a page dedicated to over 120 installation ceremonies from which to choose.	<a href="#">Link</a>
Key Messages	These messages are intended to help you understand and speak confidently about the direction our organization is heading.	<a href="#">Link</a>
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.	
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. <a href="https://www.soroptimist.org/for-clubs-and-members/donate/individual-gifts.html">https://www.soroptimist.org/for-clubs-and-members/donate/individual-gifts.html</a>	<a href="#">Link</a>
Live Your Dream	The Live Your Dream: Education and Training Awards for Women is the identifying Dream Award project for SIA. The program (LYD) was established in 1972 to assist women with (LYD) 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, childcare, 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.	<a href="#">Link</a>
LiveYour Dream.org	An online community empowering offline volunteer action. The self-motivated network LiveYourDream.org 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.	<a href="#">Link</a>
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.	<a href="#">Link</a>

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 your right side where it is more easily read. It should be worn to all club meetings and other Soroptimist events.	<a href="#">Shop</a>
Past President's Pin	SIA has designed a new Soroptimist Club Past President's Pin, #110B, which is Past President's available from the SIA store.	<a href="#">Shop</a>
President's Pin	SIA has designed a new Soroptimist Club President's Pin, #110A, which is available from the SIA store. It should be a traveling pin passed on from president to president.	<a href="#">Shop</a>
Program Chair	The program chair member (usually the governor-elect) oversees, coordinates and promotes programs of Soroptimist International of the Americas within Founder Region.	<a href="#">Link</a>
Region Awards	<p><b>Julia "Bess" Combs Membership Increase Award</b> 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><b>Barbara Stevenson "S" Club Award</b> is given to honor an outstanding high school senior member of "S" Clubs in Founder Region.</p> <p><b>Power of 8 Award</b>, 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 meeting.</p>	<a href="#">Link</a>
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.	<a href="#">Link</a>
"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.	<a href="#">Link</a>
"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.	<a href="#">Link</a>
SI	An abbreviation for Soroptimist International. <a href="http://www.soroptimistinternational.org">www.soroptimistinternational.org</a>	<a href="#">Link</a>
SIA	An abbreviation for Soroptimist International of the Americas. <a href="http://www.soroptimist.org">www.soroptimist.org</a>	<a href="#">Link</a>
SIAHQ	An abbreviation for Soroptimist International of the Americas Headquarters. Email: <a href="mailto:siahq@soroptimist.org">siahq@soroptimist.org</a>	<a href="#">Email</a>
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.	<a href="#">Link</a>

[Shop](#)

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. The New Member “S” logo pin - #109 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.	<a href="#">Link</a>
Strategic Plan	Soroptimist International of the Americas model for clubs which defines the vision, mission, purpose and core values of the Federation. The plan - <b>Shaping the Future of Soroptimist through Increased Collective Impact</b> - identifies outcomes in four areas known as <b>Pillars for Success</b> : Program, Membership, Public Awareness and Fundraising.	<a href="#">Link</a>
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.	<a href="#">Link</a>
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. (Currently suspended.)	<a href="#">Link</a>
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”.	<a href="#">Link</a>
Violet Richardson Award	The <b>Violet Richardson Award</b> is a recognition program for young women engaged in volunteer action within their communities or schools. The award is given to award (VRA) 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.	<a href="#">Link</a>
Websites	<a href="http://www.si-founderregion.org">Founder Region - http://www.si-founderregion.org</a> <a href="http://www.soroptimist.org">Soroptimist International of the Americas - http://www.soroptimist.org</a> <a href="http://www.soroptimistinternational.org">Soroptimist International - http://www.soroptimistinternational.org</a>	
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.	<a href="#">Link</a>



LAUNCH

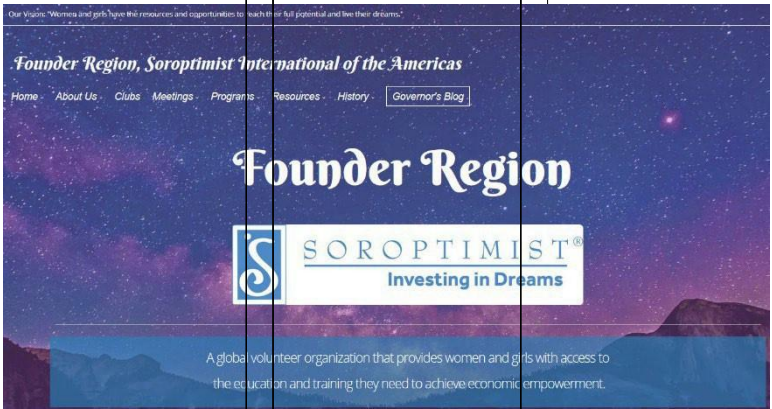
July 1, 2020

# New Founder Region Website Cheat Sheet

www.si-founderregion.org



SOROPTIMIST  
Investing in Dreams

HOME	ABOUT US	CLUBS	MEETINGS	PROGRAMS	RESOURCES	HISTORY
<b>Our work</b> Impact Core Values One Mission Video Key Messaging <b>Organization</b> Chart Regions <b>Why Women</b> Women & Girls Statistics Empowered	Board Appointed Committees Bylaws Procedures Strategic Plan <b>Lyd.ORG</b> Video Our Dream Statistics <b>Int'l/Federation</b> President's Appeal SIA SIE SIGBI SINAF <b>Fellowship</b> FRF Board What is Fellow Past FRF Presidents	Districts Club Pages Club Calendar Club Events <b>Club Dues</b>	<b>District Meeting</b> Date/Location Call/Registration Presentations Photos <b>Pres. Roundtables</b> Date/Location <b>Conference</b> Date/Location Call/Registration Nominations Photos Past Conferences Proceedings Programs <b>Leadership Training</b> Date/Location Call/Registration Presentations Photos <b>Conventions</b> Federation International	<b>Live Your Dream</b> Videos Infographic For Clubs Resources <b>Dream It, Be It</b> Videos Infographic For Clubs Resources <b>Soroptimist Celebrating Success</b> Deadline/Info Entry Form <b>"S" Clubs</b> "S" Club Award "S" Club Grants Sigma Society <b>Club Grants</b> Resources/Tips <b>Violet Richardson</b> For Applicants For Clubs Resources Timeline <b>Ruby Award</b> Info For Clubs Resources	Calendars Governance Logos Forms Treasurer Forms Membership Fundraising Program Public Awareness Handbooks Officer Desc. Committee Club Off. Desc. Fellowship Presentations Newsletter Working As One Quick Links <b>Newsletter</b> <b>Logos</b> <b>Installations</b> <b>Region Awards</b> "S" Club Award Julia Bess Combs "Power of 8" <b>Pledge/Grace Pillars</b> Fundraising Membership Program Public Awareness	How it Began First Club First Regions Purchase of Name <b>Through the Decades</b> <b>Violet Richardson</b> Biologue Photos <b>Past Governors</b> Theme Board Conferences Governor Message <b>Memorial Grove</b> History Photos Slideshow <b>In Memoriam</b> Deceased Members 1956 - Present <b>GOVERNOR'S BLOG</b>
FOOTER						
<b>Contact Us</b> Address Email <b>Soroptimist Sites</b> SIA SI LYD.org <b>Quick Links</b> LYD DI,BI Branding Forms						

# Soroptimist.org/For-Clubs-and-Members/index.html

A cheat sheet to help you find the resources and information you need for a successful club and member experience!

FEDERATION INFO	PROGRAM RESOURCES	FOR CLUBS	FOR MEMBERS	WHAT'S NEW	DONATE/FUNDRAISE
<b>Recognition &amp; Branding Tools</b> <ul style="list-style-type: none"> <li>Style and Branding Guide</li> <li>SIA Logos</li> <li>Media, Stationery and Web Templates</li> </ul> <b>Key Messaging</b> <ul style="list-style-type: none"> <li>Key Messages</li> </ul> <b>Nominations &amp; Elections</b> <ul style="list-style-type: none"> <li>Ballot information, nominations, elections results</li> </ul> <b>For Region Leaders</b> <ul style="list-style-type: none"> <li>Region governor and chair position descriptions and applications</li> </ul> <b>Additional Information</b> <ul style="list-style-type: none"> <li>General Membership Information (FAQ, Monthly Membership Stats), Governance (Bylaws, SIA Procedures, Be It Resolved), Licensing Documents (SIA Policy for Registered Marks, Licensing FAQ, Application and Fee Form)</li> </ul> <b>Soroptimist International</b> <ul style="list-style-type: none"> <li>SI President's Appeal, Friendship Link Resources</li> </ul> <b>Access Club/Member/Leadership Directories</b> <ul style="list-style-type: none"> <li>Link to login</li> </ul> <b>SIA's Strategic Plan</b> <ul style="list-style-type: none"> <li>Full and abbreviated versions in all languages</li> </ul> <b>SIA's Big Goal</b> <ul style="list-style-type: none"> <li>Club Exercise Results, Update</li> </ul> <b>Leadership Development</b> <ul style="list-style-type: none"> <li>General Leadership Topics, Conflict Resolution, Meetings, Healthy Club Resources</li> </ul>	<b>Live Your Dream Awards Club Resources</b> <ul style="list-style-type: none"> <li>Introduction and impact Information</li> <li>Materials and Tips for Recruiting Applicants</li> <li>Tools for Selecting Recipients</li> <li>Tips for Honoring Recipients</li> <li>Materials Needed for Reporting</li> <li>Raising Awareness (publicity tools and more)</li> </ul> <b>Dream It, Be It Club Resources</b> <ul style="list-style-type: none"> <li>Program Curriculum</li> <li>Planning Tools</li> <li>Procedures for Working With Youth</li> </ul> <b>Soroptimist Club Grants for Women and Girls</b> <ul style="list-style-type: none"> <li>Application Tips</li> <li>Impact Reports</li> </ul> <b>LiveYourDream.org Member Resources</b> <ul style="list-style-type: none"> <li>LiveYourDream.org Goals, Member Resource Guide</li> </ul>	<b>Recruitment Tools</b> <ul style="list-style-type: none"> <li>The Diamond Campaign</li> <li>Recruitment Tips</li> <li>Inducting New Members</li> <li>Other Recruitment Tools</li> </ul> <b>Retaining Members</b> <ul style="list-style-type: none"> <li>Retention Tools</li> <li>Club Assessment Tools</li> </ul> <b>Soroptimists Celebrating Success Awards</b> <ul style="list-style-type: none"> <li>Entry form, Recipients</li> </ul> <b>Club Administration</b> <ul style="list-style-type: none"> <li>General Information including Club Roadmap, Club Calendar, Finance Information, Insurance Information, Club Merger Resources, and more</li> </ul> <b>Pay Dues/Manage Club Roster</b> <ul style="list-style-type: none"> <li>Link to pay online, Forms 5008, 5010, 200, Dues/Fee Amounts</li> </ul> <b>Club Member Forms</b> <ul style="list-style-type: none"> <li>All the forms you need in one place!</li> </ul> <b>Welcome New Clubs</b> <b>Chartering New Clubs</b> <ul style="list-style-type: none"> <li>New Club Building Resources</li> </ul>	<b>Access/Update Your Member Profile</b> <b>Membership Benefits</b> <ul style="list-style-type: none"> <li>Individual member benefits</li> </ul> <b>Best for Women Newsletter</b> <ul style="list-style-type: none"> <li>Download current and past issues</li> <li>Subscribe</li> <li>Send letter to the editor</li> </ul>	Important updates, headquarters highlights, news from your federation president and more.	<b>Individual Gifts</b> <ul style="list-style-type: none"> <li>Laurel Society</li> <li>Monthly Giving</li> </ul> Enrollment forms, links to give online, giving levels <b>Club Gifts</b> <ul style="list-style-type: none"> <li>Club Giving</li> <li>Founders Pennies</li> </ul> <b>Planned Giving</b> <ul style="list-style-type: none"> <li>Laurel Legacy information and enrollment form</li> </ul> <b>Other Ways to Give</b> <ul style="list-style-type: none"> <li>Memorial and Tribute Gifts</li> <li>Employer Matching Gifts</li> <li>GoodSearch</li> <li>Amazon Smile</li> </ul> <b>How Contributions Are Used</b> <ul style="list-style-type: none"> <li>Audited Financial Statements</li> <li>Form 990</li> <li>GuideStar Information</li> <li>SIA Annual Report</li> <li>SIA Tax Disclosure</li> </ul> <b>Donor Thank You</b> <ul style="list-style-type: none"> <li>Donor Honor Roll</li> <li>Lists of Donors</li> </ul>

**SHOP** the new Soroptimist Store at: [Soroptimist.org/for-clubs-and-members/shop/index.html](https://soroptimist.org/for-clubs-and-members/shop/index.html)

**TRANSLATED RESOURCES** are now accessible by language from all main pages in the *For Clubs & Members* section!

**Need help finding something?**

We're here if you need us! Call 215.892.9000 or email [siahq@soroptimist.org](mailto:siahq@soroptimist.org) and we'll be happy to help you.



**SOROPTIMIST**  
Best for Women®