



SOROPTIMIST

Best for Women

Ten Steps to Chartering a New Soroptimist Club

Full Kit

Introduction

Building new Soroptimist clubs is essential for maintaining the vibrancy of our organization. Mentoring a new Soroptimist club can be one of the most rewarding experiences of your volunteer career. As you go through the 10 steps on your way to sponsoring a new club, remember that the professional staff at SIA headquarters is available to provide materials, forms and advice. Region leadership is also available to assist with orientation, education and support.

There is no standard time frame for chartering a club. It can take anywhere from three to six months to a year to charter a new club. The important thing is to keep the momentum going and instill a sense of ownership in the prospective members. The enthusiasm of a committed core of prospective members goes a long way toward generating excitement and interest in being a part of a new club.

The following “Ten Steps At-A-Glance” can be used to develop your timeline and plan. A detailed look at each step is also provided to guide and assist you during the charter process. *NOTE: There are many examples and resources available to assist you with this process. Resources marked with an asterisk (*) indicate that those materials are included in the full kit version of “Ten Steps to Chartering a New Soroptimist Club” and also available separately in the members areas of www.soroptimist.org.* Remember that plan modifications will most likely be necessary throughout the charter process. Please feel free to contact SIA headquarters for assistance at any time.

Ten Steps: At a Glance

Develop your timeline and plan by discussing each step of the charter process listed below and filling in estimated dates for completion. Plan modifications will most likely be necessary throughout the charter process. Please feel free to contact SIA headquarters for assistance at any time.

Step One:

- _____ Enlist a charter team.
- _____ Choose an individual to serve as the charter team coordinator.

Step Two:

- _____ Determine the target area.
- _____ Develop a plan and timeline, including a schedule of informational meetings.
- _____ Develop a budget.
- _____ Complete and send **Form A: Declaration of Intent to Charter**.

Step Three:

- _____ Develop a list of prospective members.

Step Four:

- _____ Make arrangements for informational meetings.
- _____ Send invitation letters.
- _____ Access online **New Club Building Kit**
- _____ Hold informational meetings.

Step Five:

- _____ Follow up with prospective members.
- _____ Continue holding informational meetings.
- _____ Complete and submit **Form B: Results of Informational Meetings**.

Step Six:

- _____ Host organizational meetings to discuss the new club's meeting schedule, officer positions, bylaws, dues and potential projects.

Step Seven:

- _____ Hold last organizational meeting to finalize details and the new club's first project.

Step Eight:

- _____ Complete and submit **Form C: Charter Application Form** with required paperwork and appropriate dues/fees.

Step Nine:

- _____ Plan the charter celebration.

Step Ten:

- _____ Work with the region to make sure the new club gets frequent attention and nurturing during the critical first year.

Step One: Enlist a Charter Team

Start with members from your own club, members from other clubs in the area, past club presidents, members who have held region offices and the current region membership chair. Members of clubs that have recently sponsored a new club will be an especially valuable resource.

Try to include people on the charter team who:

- are passionate and enthusiastic about Soroptimist membership
- have a firm understanding of the Soroptimist organization as a whole
- have excellent marketing and presentation skills
- are knowledgeable about project opportunities in the area, particularly with regard to the Women's Opportunity Awards
- are ready to engage with other team members and willing to accept delegated responsibilities.

Once you have a team together, nominate one person to be the charter team coordinator. This person will have primary responsibility for the charter process, including making sure that forms are completed and following through with the new club.

Step Two: Determine Areas of Opportunity/Develop a Plan

Working with the charter team, decide where the best area is to develop a new club. Consider the following criteria:

- no club currently exists
- a club used to exist
- a club exists but potential members cannot join because of meeting time/day or they are interested in participating in different projects
- the region has received Introduction Forms from prospective members in the area via the SIA website.

Large metropolitan areas can easily support several clubs that can work collectively on projects and even have joint meetings when appropriate. The population of a city or town, however, will not be an indicator of a new club's success. Some of the strongest Soroptimist clubs are in small communities. The most important strategy is to identify an area with business and professional women interested in working on projects that improve the lives of women and girls.

Once the target area is determined, develop a timeline and plan* for sponsoring a new club. Decide when informational meetings will be held, when invitation letters will be mailed and when follow-up will take place. Allow about two to three weeks between mailing invitation letters and holding an informational meeting. You might want to plan a series of informational meetings on different days of the week and at various times of the day to accommodate the schedules of prospective members.

Based on the plan, develop a realistic budget. Estimate the cost involved in travel and telephone expenses, hosting meetings, sending mailings and producing materials. Make sure your club (with any region contributions) has the resources to cover these expenses. Contact your region governor to determine if there are available funds or assistance for chartering a new club.

Complete **Form A: Declaration of Intent to Charter** and send the form to SIA headquarters, the region governor and the region membership chair. Remember to include complete information about the charter team coordinator who will be organizing the efforts. Be sure to access the online **New Club Building Kit** (www.soroptimist.org/members/membership/newclubbuildingkit.html) which contains a customizable recruitment flyer, brochure, and membership presentation template. The kit also contains a Soroptimist FAQ, Soroptimist Women's Opportunity Awards flyer and links to the *Best for Women* magazine. **Form A** should also provide the dates of the informational meetings. Following the meetings, a staff member from SIA headquarters will follow up to learn the results of the meetings and offer assistance.

Step Three: Create a List of Prospective Members

Involve all members of the charter team and your club in creating a list of potential members. List the names of business colleagues, relatives, friends and professionals such as physicians, nurses, lawyers and accountants whose names may be in professional directories. Ideally your prospect list should contain a minimum of 100 names.

Look in local newspapers for business articles, advertisements, social events, announcements of job changes and awards to identify women community leaders who may be interested in joining a prestigious and influential organization whose mission is to improve the lives of women and girls. Find out which of the community's public officials are women and add their names to the list. Also explore the following resources for finding and soliciting prospective members:

- association/professional/trade publications
- local Chamber of Commerce list of members
- Women's Yellow Pages
- local newspapers (new firms, women executives, community leaders)
- women who have had prior contact with sponsoring or neighboring clubs (speakers, honorees, assisted with projects)
- published lists of contributors to women's causes
- SIA website (check with region membership chair for leads from prospective members).
- place ads in local papers detailing the many benefits of Soroptimist membership (sample ads are available in the membership section of the SIA website).

Although it is possible to purchase mailing lists, keep in mind that using these lists makes it difficult to convey a personal touch or make potential members feel special. Prospects will feel flattered if they know they were sought out because of their standing in the community and their accomplishments rather than because they happened to be a name on a purchased list.

Step Four: Host a Series of Informational Meetings

The goal of an informational meeting is to generate enthusiasm among prospective members about Soroptimist. Remember to keep it simple! Provide enough information to demonstrate the benefits of belonging but try not to intimidate or overwhelm the attendees. Focus on the ways Soroptimists improve the lives of women and girls through local club projects and federation programs such as the Women's Opportunity Awards. Stress that the new club would be part of an international network of clubs, and that membership provides access to 90,000 business and professional women worldwide who face the same challenges of balancing career, family and volunteerism.

Select a quiet venue, appropriate for a meeting. Invite region leadership to participate in the program. The following resources are also available separately in the membership section of the members area of www.soroptimist.org to help plan an informational meeting:

- sample invitation and follow-up letters*
- sample press release*
- sample meeting agenda and script*

During the informational meetings, identify key people who seem excited about the new club and whose energy and enthusiasm is contagious. Look for those who are especially well connected in the community. These women will be critical in making the new club part of the community and attracting additional members.

Ask those attending the meetings if they know of others who might be interested in joining the new club. Collect these names and have someone follow up to invite them to the next meeting. Do not rely on the prospective member to follow up with this new contact.

Some clubs are able to recruit enough potential members interested in forming a new club after only one or two informational meetings. Other instances require three or four meetings to gather the 18 to 25 potential members necessary to move to the next phase of holding organizational meetings.

Additional tips for engaging prospective members:

- Direct prospects to SIA's website (Live Your Dream, Who We Are, What We Do, Check It Out)
- Send prospects to SIA's social media sites for immediate engagement (Facebook, Twitter, YouTube, Flickr and LinkedIn)
- Purchase and distribute SIA's promotional cards to raise awareness about SIA and the work we do
- Utilize the **SIA Annual Report** and/or **Program Impact Report** to show the impact of SIA's programs that improve the lives of women and girls (available in PDF and video version on SIA website).

Step Five: Follow-up with Prospective Members

Contact prospective members between informational meetings to maintain enthusiasm. Consider establishing a committee to contact these women by phone, email or personal note to reinforce the connection. Make sure to mention the day, time and location of the next meeting and invite attendees to provide names, addresses, telephone numbers and/or email addresses of colleagues, friends and family members who might be interested.

Persistence is key to making extension and recruitment efforts work. Keep asking and don't give up. Create a file of the names and addresses of prospects unable to make an initial commitment. Plan to make follow-up phone calls and/or send personal notes within a few months, and include them on the mailing list of the future club. Send them the new club's newsletter and invitations to the club's projects and fundraisers, as well as subsequent invitations to join.

Complete **Form B: Results of Informational Meetings** and send to SIA headquarters, the region governor and the region membership chair.

Step Six: Host New Club Organizational Meetings

Once you feel you have enough potential members to charter a new club, it's time to move to the next phase of holding organizational meetings. To charter a new club, 18 **regular** members are required. (**Regular** members are those working in a profession or business or in an occupation of comparable status or responsibilities.) You can move the prospective club to the next phase of holding organizational meetings with only eight to 10 members. Those who want to form a new club should not be kept waiting too long.

Don't forget, you can and should invite to membership retired/unemployed women who may have the time to help get a new club started. However, these prospective members do not count toward the 18 regular members required to charter a new Soroptimist club.

These meetings are the appropriate time to discuss projects the club might be interested in undertaking. An ideal first project is the Women's Opportunity Awards. Federation-produced materials are available in the program section of the members area of www.soroptimist.org to help the club conduct the project. The organizational meeting is a good time to show the Women's Opportunity Awards Public Service Announcement (if the club is English-speaking). If the time of year is not right to give a Women's Opportunity Award, the club can work on fundraising so the award can be given the following club year. The size of the cash award is not important. Participation in the organization's major project and the creation of a common focus will help the club succeed.

The purpose of organizational meetings is to make sure women understand the responsibilities of Soroptimist membership, including financial and time commitments. Outline the costs of region, federation and international dues, which need to be built into club dues or added on as a separate billing. The emerging new club is responsible for setting the club portion of the dues, which should cover costs such as officer expenses, a newsletter, and delegate expenses to region conference and federation convention.

These meetings should also include discussion about:

- how often the club will meet and when
- whether any women are interested in serving as officers
- what needs to be included in the club bylaws*

A new club's culture is formed during these meetings. It's important to keep the momentum going. Interaction among attendees will increase their sense of involvement and ownership in the club. Encourage prospective members to engage in informal, general discussion on any and all topics raised. Have regular meetings. Keep everyone informed through ongoing email communication. Busy working women may not be able to attend every meeting. The new club should learn how to accommodate these absences as long as the willingness to participate in projects or fundraising is evident. The charter team will need to devote a lot of time to keep the new club on track but should consider gradually transferring administrative responsibilities to the new club members.

Additional tips for engagement:

- Use the Live Your Dream materials to raise awareness; plan a special "Live Your Dream" event, distribute pins throughout the local community, invite female leaders from local business and organizations.
- Invite a local Soroptimist award recipient (Women's Opportunity or Violet Richardson) to share her story and how Soroptimist changed her life.
- Have each of the committed prospects invite at least one prospective member to participate in a planned event or project with no immediate pressure to commit to membership right away.

Step Seven: New Club Emerges

At the last organizational meeting, the sponsoring charter team should help the new club finalize the following details and activities:

- decide on a club name that reflects a real community or geographic area
IMPORTANT! *When selecting a name for your new Soroptimist club, please keep in mind that as part of an international organization, it's critical that we define the communities we serve (not where members live) both locally and with the public at large. Each club name should be a geographically descriptive name that is identifiable throughout the entire SI family to enhance recruitment and public awareness efforts. Please feel free to contact the membership department at headquarters if you have specific questions or need suggestions or advice.*
- determine frequency/location/time of meetings
TIP ⇒ Clubs should hold a minimum of one meeting each month. The day, time of day, and location of the meeting should be convenient to the majority of the members, considering work and life obligations. Be sure to provide a variety of flexible options for members to participate and find ways to support the time and talents that members can give in light of their other commitments.
- choose a tentative charter date (determine availability of region governor)
- establish an Employer Identification Number (EIN) (U.S. clubs only)
TIP ⇒ In order to establish a club bank account, you need to apply for an EIN (Employer Identification Number) from the IRS. The form with instructions is available on the IRS website (www.irs.gov). You will also need your club's EIN to apply to become part of SIA's 501(c)(3) group exemption. The new club will receive specific information from headquarters about applying for inclusion in SIA's 501(c)(3) group exemption shortly after headquarters receives the final charter paperwork and federation dues.
- open a bank account
- establish a club budget*
- establish club dues/fees (include region, SIA and SI dues in the total amount)
- review costs of commitment (monetary and time)
- determine primary needs of women and girls in the community
- choose club projects and fundraisers, including the Soroptimist Women's Opportunity Awards
- elect club officers

- adopt club bylaws *(sample provided)
- club email address will be created and sent to club president by SIA headquarters
- form a committee to plan the charter celebration

Step Eight: Apply for a Charter

Ideally, the new club should have recruited at least 25 women who intend to be charter members. At a minimum, there must be 18 **regular** members who have paid their dues and submitted their paperwork before a charter can be issued. At least four weeks before the charter date, complete **Form C: Charter Application Form** and send to SIA headquarters, the region governor and the region membership chair.

To receive a charter, the following MUST be submitted to SIA headquarters:

- Form C: Charter Application Form
- Form 5008 for a minimum of 18 regular members
- Payment of dues and fees as appropriate*
- Completed Form 200 indicating the club officers
- Club Bylaws

The forms and Sample Club Bylaws are available in the membership section of the members area of www.soroptimist.org.

*Note: Held every other year in even-numbered years, federation conventions provide education, networking, and social opportunities. In addition to inspiring speakers and workshops, the convention also offers an opportunity to participate in the federation decision-making process and meet Soroptimist members from around the world.

Producing a convention involves certain fixed costs that are divided over the number of clubs equally resulting in a mandatory club convention fee. Each club must remit a convention registration fee in the amount established by the SIA Board of Directors no later than March 15 of the year preceding the convention. Clubs chartered from May 1 to the end of the convention in a convention year (even-numbered years) are not required to pay the mandatory club registration fee for that convention.

Also, to eliminate any confusion regarding dues billing for the new club year (July 1 through June 30), clubs that charter in May and June should include their prorated dues for the current club year, plus their dues for the upcoming club year.

The official charter will be mailed to the region governor for her signature and presentation to the club at the charter event. The charter club president will receive congratulatory letters, notification of its assigned six-digit club number, and information about the Soroptimist club e-mail account established by headquarters for the new club. The club email address will allow the public to have a direct contact to the club, while keeping members' personal email information private. The club email address will be used on the SIA website and can be used on the club or region website, on brochures, or any other public awareness venue that the club uses. A designated member (club secretary or president) should be checking the club email regularly to keep up to date with the latest SIA news and responding in a timely manner.

Shortly after the new club has officially chartered, headquarters will send the appropriate forms to new U.S. clubs ("subordinate") to facilitate inclusion in the group exemption from federal income tax under Soroptimist International of the Americas, Inc. - a 501(c)(3) organization ("central organization"). Soroptimist clubs that submit the appropriate documentation to headquarters, and subsequently receive confirmation from headquarters, are included in the group exemption granted by the IRS, which enables the clubs to also exist as 501(c)(3) organizations.

Step Nine: Charter Celebration

After a minimum of 18 regular members required to charter have committed to membership and the required paperwork is completed, it is time to celebrate! The charter date and charter celebration rarely (and do not need

to) coincide. Obtaining a charter requires the completion of certain administrative tasks as well as orientation. The celebration should occur after all paperwork is completed.

The charter celebration is the occasion where the region governor (or another official whom she designates) presents the charter to the new club. You can make this event as formal or informal as you wish. The important thing is to be creative and make it meaningful for your new club members. Often a party is held and Soroptimist clubs from the region are invited to attend (at their own expense). When scheduling the event, make sure to choose a day and time convenient for the majority of the charter members and officers as well as for region officers and members of nearby clubs. The presence of region leadership and members from other clubs reinforces the connection of the new club to the larger Soroptimist family and lets members know how important they are to our organization.

Include members of the new club in the planning of the charter celebration to give them an opportunity to work together. Consider planning the new club's first fundraiser in conjunction with the celebration. For example, plan a raffle or silent auction to fund the club's first Women's Opportunity Award.

Upon chartering, clubs will receive a special form from SIA that they can complete and return to public relations staff at headquarters, who will then use the information to send a news release announcing the new club to the local media. If the chartering club prefers to draft and distribute the news release, a sample release is available in the membership section of the members area of www.soroptimist.org.

Step Ten: Nurturing the New Club

The work of supporting the new club doesn't end once it is chartered. Just as you are concerned with what happens to a new member during her first year, you should also be concerned about a new club during its first year. The following activities are strongly suggested as ways to nurture the new club:

- designate someone from the charter team to contact the charter club president by phone at least once a month (usually the charter team coordinator or district director if the region has them)
- provide guidance for the new club during the first nomination of elected officials, dues renewal, and region conference and federation convention registration
- mentor the new club through its first Women's Opportunity Awards project
- introduce the new club and members at district and region meetings.
- encourage the new club to participate in and attend the sponsoring club's projects and celebrations
- encourage the sponsoring club to participate in the new club's projects
- plan a one-day joint project between your club and the new club
- if clubs are in close proximity, offer transportation to district or region meetings
- have the charter team coordinator attend the new club's board meetings.

Nurture but do not dominate the new club. The new club needs to build its own culture based on the interests and styles of its members. It is okay if the new club does things differently than your club. Each club has the opportunity to identify the ways in which members can support SIA's mission of improving the lives of women and girls in their own unique way. The important thing is that the new club be given the tools and support needed to succeed. Encourage the new club to commit to the following basic principles to ensure a vibrant, relevant club:

- leadership is appropriate to the needs of the club
- goals are clear and shared by all
- communication is open, frank and non-threatening
- decision-making is an open and understandable process
- growth and welfare of all members are taken into consideration
- everyone is involved and participates at their maximum level of comfort and ability
- evaluation of the effectiveness of its operation and a willingness to change when necessary are promoted.

Resource List

The following resources (*marked with an asterisk*) are included in this kit, and are also available in the membership section of the members area of www.soroptimist.org:

- Ten Steps at a Glance (Sample Timeline and Plan)
- Sample Informational Meeting Agenda and Script
- Sample Letters and Telephone Script
- Sample News Release: Informational Meeting
- Sample News Release: New Club Formed
- Sample Club Bylaws
- Sample Club Budget
- Form A: Declaration of Intent to Charter
- Form B: Results of Informational Meetings
- Form C: Charter Application Form

Additional Resources available on SIA website (www.soroptimist.org):

- New Club Building Kit
- Soroptimist 101
- Membership FAQ
- Soroptimist History
- Classification Guide
- Club Strategic Plan Template
- Club Membership Marketing Campaign Template
- Recruitment Manual
- Retention Manual
- Keeping the Balance for Clubs
- Engaging Prospective Members
- Communicating Across the Generations
- “Soroptimist: Helping Women and Girls Live Their Dreams” DVD

Be sure to visit the **program**, **public awareness** and **fundraising** sections in the member’s area of the SIA website for additional resources.

Ten Steps: Sample Informational Meeting Agenda

The informational meeting is the opportunity to introduce interested women to Soroptimist. It should be short, informative and interesting—do not inundate prospective members with too much information. Make name tags for everyone including current members and guests. Distribute materials including the Soroptimist Living Their Dreams brochure, the Soroptimist Women’s Opportunity Awards brochure, the Soroptimist ad collection, and recent issues of *Best for Women* magazine. Serve refreshments and consider collecting business cards for a raffle or prize drawing at the end of the evening.

Agenda:

- Sign In
- Welcome
- Brief History and Overview of Soroptimist
- Introduce the Region Governor or other Region Leadership to discuss the Soroptimist mission and impact and benefits of belonging
- Personal Story of a Women’s Opportunity Award Recipient (or representative of a women’s group such as the local domestic violence shelter that has received assistance from the sponsoring Soroptimist club)
- Timeline/Process for Forming the New Club
- Invitation to Join
- Questions/Answers
- Networking Opportunity/Social Interaction

Ten Steps: Sample Informational Meeting Script

Good evening. My name is (*name*) and I am a member of Soroptimist International of (*club name*). I would like to thank you for joining us. Isn't it wonderful to see so many interesting and accomplished women? I'm here this evening to talk about how you can join us in our mission to improve the lives of women and girls by helping to form a new Soroptimist club right here in (*name of city/town*).

Before we begin, let's take some time to get acquainted. Please stand and introduce yourself, tell us where you work and share a "fun fact" about yourself.

Our name, Soroptimist, means best for women. And that's what we are—women at our best helping other women to be their best. Soroptimist is an international volunteer organization for women just like you—business and professional women who wish to give back to their communities in an atmosphere of fun and friendship. Today nearly 95,000 Soroptimists make a difference for women and girls in more than 100 countries throughout the world.

I'd like to present _____ who is governor of _____ Region. Governor (first name) is going to talk a bit more about Soroptimist's mission and the benefits of belonging. **(Note: if the governor or her representative is unable to attend, continue with the script as written.)**

(Governor) Thank you (*new club charter team coordinator/representative*). As you've been hearing tonight, membership in Soroptimist offers a multitude of benefits. For me, the primary benefit is the joy of seeing the difference that we, as a group, can make in the lives of women and girls who need our help. Social services often fall short for the people who need them most. Even when women manage to get financial assistance, they often need emotional and social support to guarantee success. And that's where Soroptimist comes in.

Soroptimist clubs identify the ways in which they can best serve women and girls in their communities. Projects are varied, depending upon individual community need and the interests, talents and resources of the club members. Some clubs renovate rooms in domestic violence shelters. Some mentor women completing welfare to work programs. Others provide computer training for low-income women. And still others offer free mammograms to women who can't afford them.

We are especially proud of the Soroptimist Women's Opportunity Awards program. We've been giving these cash awards to women since 1972, to help them gain the skills, education and training they need to improve life for themselves and their families. This program allows recipients to use the award money for any expenses

associated with their education or training—including books, childcare or transportation. Collectively, we give nearly \$1.5 million each year in cash grants through this unique program.

These women are survivors who overcome adversity that includes poverty, domestic violence, sexual abuse and substance abuse. They are strong, motivated, and a constant source of inspiration to our members as we watch them move from lives dominated by despair to those filled with hope. We often hear that although the money was helpful, it was the show of support from our members that truly made the difference.

Soroptimist believes in helping women to live their dreams by providing them with the resources they need to change their lives. We also believe that when you help a woman, you also help her family, the community, and the world. As women, business people, mothers and daughters, we feel uniquely qualified to reach out to women the world over.

Right now I'd like to introduce (*name of Women's Opportunity Awards recipient*). (*Name*) was our club's Women's Opportunity Awards recipient in (*year*). She'd like to share her amazing story with you.

(Women's Opportunity Award recipient tells her personal story, emphasizing the role that Soroptimist and the award played and/or show video clip from SIA website.)

(Governor returns) Thank you (*name of Women's Opportunity Award recipient*). Isn't she remarkable? As you have just seen, improving the lives of women and girls is the most exciting benefit of Soroptimist membership. But there's so much more. When you're a Soroptimist, you'll form friendships with women who have similar interests and values. You'll meet women from different ethnic and cultural backgrounds. You'll network with other women representing a variety of professions. You'll make valuable business contacts. You'll sharpen your skills as you take advantage of leadership opportunities at all levels of the organization.

Thank you again for coming here this evening to learn more about our organization and all the great things we do. Now _____ (*name of charter team coordinator/representative*) will close our program.

(Club member) Thank you Governor (*first name*). Well, we hope you've enjoyed learning about Soroptimist. We've handed out some materials and a recent copy of our award-winning *Best for Women* magazine, which all members receive as part of their dues. Please take them with you. There are more in the back if you'd like extras for your friends.

We have a few more informational meetings scheduled, so if you think of anyone who might be interested, please let me know. Soon after, we will have our first organizational meeting on *(date/time)* as our goal is to charter a new club in this community by _____.

I'd like to invite each and every one of you to become members in this new Soroptimist club. Soroptimist membership has a lot to offer, but we can't do it without the energy and ideas of women like you. We would be thrilled to have you join us in our quest to improve the lives of women and girls. While our collective impact is vast, remember that each local club undertakes only those projects that they choose. Other than the Women's Opportunity Awards, there are no mandates that require commitments of time and money. As a member of a new club, you will have the opportunity to shape club culture and influence what projects will be undertaken to improve the lives of women and girls in the _____ community.

Please join us in the back for refreshments. We'll be available to answer your questions and to get to know you a little better. Thank you again for being here this evening and we hope to see you again!

Ten Steps: Sample Letters and Telephone Script

Clubs using these sample letters should produce the final versions on Soroptimist or club stationery.

Informational meeting invitation letter

(Date)

Lisa Jones, President
Citizens Bank
55 Main Street
Anytown, Anystate 10555

Dear Lisa:

As a busy working woman, you juggle the many demands of family and job. Yet, if you're like me, you also feel a need to give back to your community. Wouldn't it be nice to do that with a group of women who combine their unique talents and energy to help other women? If you are looking for a way to improve the lives of women and girls in your community in an atmosphere of friendship and fun, then joining Soroptimist may be right for you. Please join us for an informational meeting on July 23 at 7:00 pm at the Sheraton to learn more about the new Soroptimist club forming in Anytown.

I'm a member of Soroptimist International of *[insert club name]*. For 15 years, we've been working to improve the lives of women and girls. As part of an international organization with clubs in more than 100 countries, we make a difference for women around the world. Joining a Soroptimist club offers networking opportunities, valuable business contacts, friendship, diversity and leadership opportunities.

Most important, Soroptimist membership connects women to each other and to their local communities. The Soroptimist mission of improving the lives of women and girls is exemplified by our major project, the Soroptimist Women's Opportunity Awards. Each year Soroptimist gives nearly \$1.5 million to women who need to improve their job skills through education and training. Most are single moms and many are domestic violence survivors. Soroptimists also work on other projects that reach out to women and girls, including preventing and ending domestic violence and human trafficking.

I will call you on Tuesday to touch base. In the meantime, please visit our club website at www.siofanytown.org or Soroptimist International of the Americas website at www.soroptimist.org for more information about the exciting ways we work to improve life for women and girls. If you would like to reach me before then, please call 609-555-1453 or e-mail me at janesmith@hotmail.com. I look forward to speaking with you soon!

Sincerely,

Jane Smith
President
SI of *[insert club name]*

Sample follow-up letter for those who attended an informational meeting

(Date)

Lisa Jones, President
Citizens Bank
55 Main Street
Anytown, Anystate 10555

Dear Lisa:

Thank you for attending the Soroptimist informational meeting to learn how you can improve the lives of women and girls through the formation of a new Soroptimist club in Anytown.

We hope you are excited about the prospect of becoming a Soroptimist member. As a Soroptimist, you will have the opportunity to work on local projects that address unique challenges facing women today and to participate in programs developed and sponsored by Soroptimist International of the Americas. This includes the Soroptimist Women's Opportunity Awards program, our major project targeting women who need additional training and education to improve their employment possibilities. Each year, our organization grants nearly \$1.5 million through this program to women who are trying to create a better life for themselves and their families.

We hope your interest in forming a local club will continue. You can be sure that membership will provide excellent opportunities for volunteerism, friendship, personal growth, leadership development, business networking, and international connections.

You are invited to our next meeting which is planned for *(time, date, and place)*. In the meantime, please contact me at *[insert phone number]* or *[insert email address]* with any questions. Also let me know if you think of other women who may be interested in attending our next meeting.

I look forward to seeing you again!

Sincerely,

Jane Smith
President
SI of *[insert club name]*

Sample follow-up letter for those unable to attend informational meeting

(Date)

Lisa Jones, President
Citizens Bank
55 Main Street
Anytown, Anystate 10555

Dear Lisa:

I am sorry you were unable to attend the Soroptimist informational meeting that we held last night. We had an exciting meeting with a great group of women. We discussed forming a Soroptimist club in Anytown, and because of the overwhelming interest we will be moving forward with our plans. We would be delighted if you would join us for our upcoming organizational meeting. At that time we will discuss leadership opportunities in the club and our first community project. Early ideas include participating in the Soroptimist Women's Opportunity Awards (a wonderful project that helps women to improve their employment prospects through additional training and education), supporting the local domestic violence shelter, or providing education about the sex trafficking of women and girls.

I have enclosed the information that was distributed at the meeting. I think you will find that joining a Soroptimist club can be an exciting opportunity to improve the lives of other women, meet new friends and make new business contacts. Through Soroptimist membership, the combination of diverse voices, skills, talents and dedication of the women in our community enables us to accomplish more than we could do alone.

Carol Johnson, executive director of Safe Haven Women's Shelter, will be spearheading the creation of the new club. She will be in touch soon to let you know about the next meeting. In the meantime, if you have any questions, please contact me at *[insert phone number]* or *[insert email address]*.

Sincerely,

Jane Smith
President
SI of *[insert club name]*

Enclosures: Living Their Dreams brochure
Best for Women magazine
Soroptimist Women's Opportunity Awards brochure

Sample follow-up phone call script for those who attended an informational meeting

Hello (first name of prospective member), this is (name) of Soroptimist International of (club name).

Is this a good time to talk?

Good. First I want to thank you for coming to the informational meeting on (day). We were impressed by all the interesting and accomplished women who turned out. What did you think?

Are you still interested in helping to form and join the new club?

That's terrific! We think you have a lot to offer this club, and that Soroptimist membership has a lot to offer you.

The next meeting will be on (date and time). Can you make that meeting?

Great. See you there.

[Clubs using this sample should produce the final version on Soroptimist or club stationery.]

NEWS RELEASE: Soroptimists Seek Volunteers

NEW CLUB TO UNDERTAKE PROJECTS HELPING WOMEN AND GIRLS

Organizational meeting to be held [date]

[Date]

Insert Contact Name:

Home Phone:

Work Phone:

Email Address:

[CITY, State]—Organizers of a new Soroptimist club announced today that they will hold an informational meeting on [date and time] at [place] open to business and professional women who are looking for opportunities to improve the lives of women and girls in the local community and throughout the world.

The club will be part of Soroptimist International of the Americas, an international volunteer organization for business and professional women with almost 40,000 members in 19 countries and territories. Soroptimists volunteer their talents and energy to help women and girls live their dreams every day by giving them the resources to create positive change—for themselves, their families and their communities.

The Soroptimist mission is exemplified by its major project, the Soroptimist Women’s Opportunity Awards. Each year Soroptimist gives nearly \$1.5 million to women who need to improve their job skills through education and training. Most are single moms and many are domestic violence survivors.

The club is being organized by [name], [title/position in community], who said members of the new club will determine its areas of service based on community needs. Soroptimist projects range from renovating domestic violence shelters, to providing mammograms to low-income women, to sponsoring self-esteem workshops for teenage girls.

“Our club will offer opportunities to participate in programs that change lives, as well as to develop lifelong friendships and a network of business contacts,” said [name of charter team coordinator]. “The name, Soroptimist, means ‘best for women,’ and that’s what our club will strive to achieve.”

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[Clubs using this sample should produce the final version on Soroptimist or club stationery.]

NEWS RELEASE: New Soroptimist Club

WOMEN'S VOLUNTEER ORGANIZATION CHARTERS IN [CITY]

Club forms to benefit local women and girls

[Date]

Insert Contact Name:

Home Phone:

Work Phone:

Email Address:

[CITY, State]—Soroptimist International of the Americas, an international volunteer organization for business and professional women, recently chartered a new club in [city, state]. The organization's mission is to improve the lives of women and girls, in local communities and throughout the world.

Soroptimist International of [club name] chartered with [number] members who represent professions including [list two or three professions of members]. [Name and title of president] will be installed as the club's first president.

"These are women in our community who wish to contribute their time to helping other women," [name of club president] said. "Our club has set out to enhance the status of women and girls, both locally and globally."

[Club name] charter members join Soroptimists in more than 100 countries and territories worldwide who contribute time and financial support to community-based projects that benefit women and girls. Soroptimist's major project, the Soroptimist Women's Opportunity Awards, provides women who serve as the primary wage earners for their families with financial resources to offset costs associated with their efforts to attain higher education or additional skills and training. For more information about Soroptimist International of [club name], contact [name and email of club president or club email address].

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SAMPLE FORMAT FOR CLUB BYLAWS

SOROPTIMIST INTERNATIONAL OF (INSERT NAME OF CLUB) (INSERT NAME OF REGION) SOROPTIMIST INTERNATIONAL OF THE AMERICAS

BYLAWS

ARTICLE I Name and Territorial Limits

Section 1. The name of this club shall be Soroptimist International of **(insert club name)**.

Section 2. The territorial limits of this club shall be that territory designated as **(insert name of region)**, i.e., **(insert the territorial boundaries of region)**.

ARTICLE II Objects

Section 1. The objects of this club shall be:

- a) Promote the advancement of women through volunteer service to the community
- b) Serve as a global voice on issues of importance to women; and
- c) Engage in any other lawful activities that further the exempt purpose of the club.

Section 2. No part of the net earnings of any Club shall inure to the benefit of, or be distributable to, its directors, officers, members, or other private persons, except that each Club shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of its exempt purposes. Except as otherwise provided by Section 501(h) of the Code, no substantial part of the activities of any Club shall consist of carrying on propaganda, or otherwise attempting, to influence legislation. No Club shall participate in, or intervene in (including the publishing or distributing of statements), any political campaign on behalf of (or in opposition to) any candidate for public office. Notwithstanding any other provision of these articles, no Club shall carry on any activities not permitted to be carried on (a) by an organization exempt from federal income tax under Section 501(a) of the Code as an organization described in Section 501(c)(3) of the Code, or (b) by an organization contributions to which are deductible under Section 170(a) of the Code as being to an organization referred to in Section 170(c)(2) of the Code.

ARTICLE III Members

Section 1. Classes. There shall be three classes of members as defined in the Constitution of Soroptimist International and Federation Bylaws: regular, retired/unemployed and embarking. In addition, those members who achieved Life status on or before July 1, 2001, shall be recognized as long as membership is maintained in the Soroptimist organization.

Section 2. Privileges of membership.

- a. All members whose participation meets the requirements set forth in these bylaws, may speak, make motions and vote.
- b. Only (insert membership types) members in good standing may be elected to or retain office. Any member in good standing may serve as a delegate to federation convention, region conference, or district meeting.

- Section 3. Admission to membership.
(Include provisions for how members are accepted in the club and when membership becomes effective.)
- Section 4. Termination of Club Membership
(If the club has procedures for termination of club membership, include them in this section.)
- Section 5. Leave of absence.
(If the club has adopted leave of absence rules, include them in this section or in Section 4.)
- Section 6. Honorary recognition.
(If the club has adopted special honorary recognition procedures, include them here. This may include recognition of long standing members as determined by the club.)

ARTICLE IV Officers

- Section 1. Elected Officers.
(The officers shall be a president, secretary, treasurer, and such additional officers and/or directors as the club may provide.)
- Section 2. Eligibility.
(Include any eligibility requirements for holding office.)
- Section 3. Term of Office.
(Elected officers shall hold office for _____ year(s) beginning (month and day) or until their successors are elected. They shall be eligible for no more than _____ consecutive years in the same office.)
- Section 4. Removal from Office.
(If the club has procedures for removal of officers from office, include them here.)
- Section 5. Vacancy in Office.
(If the club has procedures for filling vacancies in office, include them here.)
- Section 6. Duties.
(If the club has procedures for specific duties for their officers, include them here. Otherwise, this can be a simple generic statement that, "Officers shall perform the duties provided in these bylaws and such other duties as prescribed for the offices in the adopted parliamentary authority." Also include a provision for bonding of treasurer, if the club has such a requirement.)

ARTICLE V Nominations and Elections

- Section 1. Nominating Committee.
(If the club uses a nominating committee, include how the committee will be constructed; whether elected or appointed; and any specific duties, such as when it reports.)
- Section 2. Election.
(Include procedures for conducting the election and the vote required to elect.)

ARTICLE VI Meetings

- Section 1. Regular meetings
Unless otherwise ordered by the club, regular meetings will be held on (when) at (where). (Clubs shall hold a minimum of one meeting each month except during regularly scheduled vacation periods of the club. Time the meeting is to be called to order should be in the standing rules.)
- Section 2. Regular business meetings
(If the club designates a particular regular meeting as its business meeting, include that designation here. Also, if the club adjourns for summer months, include the inclusive dates of adjournment here.)
- Section 3. Special meetings.
Special meetings may be called by the president and shall be called upon the written request of at least _____ active members of the club. At least _____ hours' notice (personal, written, or telephoned) shall be given each member. The business to be transacted at any special meeting shall be limited to that noticed in the call.
- Section 4. Annual meetings.
(Include the regular business meeting, which has been designated as the annual meeting for the purpose of receiving reports of officers, board of directors, and committees and for any other business that may arise.)
- Section 5. Quorum.
(Include the quorum established for the meetings of the club.)

ARTICLE VII Board of Directors

- Section 1. Composition.
(Include listing of those who constitute the board of directors. This should only include those who have a vote on the board. Others who attend the meeting as advisors, such as the parliamentarian, may also be listed in this section in a separate sentence.)
- Section 2. Duties.
(This can be a simple statement that between business meetings of the club the board has administrative authority over the affairs, funds, and property of the club, except that of modifying any action taken by the club.)
- Section 3. Regular Meetings.
(Include when and where regular meetings will be held.)
- Section 4. Special Meetings.
Special meetings may be called by the president and shall be called upon the written request of at least _____ members of the board. At least _____ hours notice (personal, written or telephoned) shall be given. The business transacted at any special meeting shall be limited to that noticed in the call.
- Section 5. Quorum.
(Include the quorum that has been established for board meetings.)

ARTICLE VIII Committees

- Section 1. (List standing committees if the club chooses to have them.)
- Section 2. Responsibilities.
(This can be a generic statement that committee shall perform the duties set forth in these bylaws and such other duties as directed by the president, the board, or as prescribed in the parliamentary

authority. It is not necessary to detail specific duties of each committee in the bylaws, unless the club wishes to do so.)

ARTICLE IX Dues, Fees and Assessments

Section 1. Fiscal Year. The fiscal year shall be (month and day) through (month and day).

Section 2. Annual Dues and Fees.
(Include annual dues and any additional fees so that the members will know exactly what their financial obligations are.)

Section 3. Assessments.
(If the club has adopted procedures for assessing their members periodically, the authority to do so should be included here. Actual assessment amounts may be included in the club's standing rules.)

ARTICLE X Parliamentary Authority

The rules contained in the current edition of *Robert's Rules of Order Newly Revised* shall be the parliamentary authority for all matters not specifically covered in these bylaws, (name of region) bylaws and standing rules, SIA bylaws and procedures, or Soroptimist International constitution.

ARTICLE XI Amendments

(Include procedure for amending the bylaws. This should include as a minimum previous notice of a proposed amendment and two-thirds vote to adopt a proposed amendment.)

ARTICLE XII Dissolution

Upon the dissolution of the Club, its governing body shall, after paying or making provisions for the payment of all of the liabilities of the Club, dispose of all the assets of the Club exclusively for the exempt purposes of the Club in such manner, or to such organization or organizations organized and operated exclusively for charitable, scientific, literary, or educational purposes, which at the time qualify as exempt organization or organizations under Section 501(c)(3) of the Code, as the Club's governing body shall determine. Any assets not so distributed shall be distributed by a court of competent jurisdiction of the county in which the Club's principal office is then located exclusively for the Club's exempt purposes. The use of any surplus funds for private inurement to any person in the event of a sale of the assets or dissolution of the corporation is expressly prohibited.

(Prepared from the Sample Format for Converting Club Procedures to Bylaws by Kay Scheld PRP, July 1998 – revised by Leigh Wintz, PRP, October 2002 and January 2007.)

Ten Steps: Sample Club Budget

Income

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

Expenses

Program expenses

Soroptimist Women's Opportunity Award	\$ _____
Soroptimist Violet Richardson Award	
Soroptimist Ruby Award	\$ _____
Club giving donation to SIA (recommended: 10% of local fundraising)	\$ _____
Founders' Pennies*	\$ _____
Program public awareness/publicity	\$ _____
<i>Program Expenses subtotal</i>	<i>\$ _____</i>

Membership expenses

Region dues	
Federation dues (SIA dues and fees, SI dues, club liability insurance)*	\$ _____
Region conference fee	\$ _____
Mandatory federation convention fee (even numbered years only)*	\$ _____
Region conference delegate(s)—meals, lodging	\$ _____
Federation convention delegate—meals, lodging (even numbered years only)	\$ _____
Region leadership workshop	\$ _____
Fall region meetings (or district meetings)	\$ _____
Membership pins and nametags	\$ _____
<i>Membership expenses subtotal</i>	<i>\$ _____</i>

Fundraising expenses

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

Operating expenses

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

Total expenses \$ _____

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

Soroptimist International of the Americas Ten Steps to Chartering a New Soroptimist Club

Form A: Declaration of Intent to Charter

Instructions: Please complete all questions below completely and thoroughly. Use the back of this form if more space is needed. Return to SIA headquarters and send a copy to your region governor and membership chair.

Contact Information:

Sponsoring Club(s) _____ Club # _____ Region _____

Name of Charter Team Coordinator _____

Address _____

Daytime Telephone Number _____ Fax Number _____

E-mail Address _____

Prospective New Club Information:

Estimated Charter Date _____

Prospective New Club Name _____

Name of city/town where new club will be sponsored _____

In what type of community is club to be chartered? urban rural suburban

Population of the community _____

Nearest Soroptimist club (in miles) _____

Other Soroptimist clubs in the area _____

Why is this area being selected for a Soroptimist club? _____

Anticipated number of members _____

Briefly describe plans _____

Informational meeting dates _____

Please complete this form and return to:
Soroptimist International of the Americas
1709 Spruce Street
Philadelphia, PA 19103-6103, USA
Fax: 215-893-5200 or email: siahq@soroptimist.org

Soroptimist International of the Americas Ten Steps to Chartering a New Soroptimist Club

Form B: Results of Informational Meetings

Instructions: Please attach a brief report outlining progress toward chartering efforts. Please feel free to include any other relevant information related to the informational meetings. Upon review of this report, headquarters will provide additional resources to assist with the new club organizational meetings.

Sponsoring Club(s) _____ Region _____

Name of Charter Team Coordinator _____

Address _____

Daytime Telephone Number _____ Fax Number _____

E-mail Address _____

Dates of Informational Meetings _____

How many women attended? _____

Do you think you are still on target for your estimated chartering date? Yes No

If no, when do you estimate that the charter will be complete? _____

Have you contacted someone from the region to assist with chartering the club? Yes No

If yes, who? _____

If no, why not? _____

Are there any specific issues or problems you are having for which you would like assistance from headquarters or your region? Please explain. _____

Please attach a brief progress report (no more than two typed pages) including the following information:

- A. Status of recruitment efforts
- B. New developments
- C. Problems encountered
- D. Other relevant information

Please complete this form and return to:
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Philadelphia, PA 19103-6103, USA
Fax: 215-893-5200 or email: siahq@soroptimist.org

Soroptimist International of the Americas

Ten Steps to Chartering a New Soroptimist Club

Form C: Charter Application Form

Instructions: Prepare and sign three copies of this form: retain one for club files; send one to region governor for signature; and mail original to SIA headquarters with the following attachments:

- **Form 5008 (New Member Enrollment/Reinstatement Form)** for a minimum of 18 regular members
- Appropriate dues/fees for charter members (minimum of 18 members)
- **Form 200 (Club President and Treasurer Form)**
- Club Bylaws

Processing of this form takes four weeks.

Date _____

The _____ Region requests a charter for:

Soroptimist International of _____

Charter Date (a minimum of 4 weeks from today's date) _____

Number of Members (minimum of 18) _____

President's Name _____

Club Dues (amount per year) _____

When will dues be collected each year? _____

Number of meetings each month _____

Name of sponsoring club _____

Signatures of:

New Club President Date

Charter Team Coordinator Date

Region Governor Date

Please complete this form and return to:
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Philadelphia, PA 19103-6103, USA
Fax: 215-893-5200 or e-mail siahq@soroptimist.org