



SOROPTIMIST

Best for Women

# Ten Steps to Chartering a New Soroptimist Club

**Manual Only**

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# Introduction

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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](http://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

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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](http://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](http://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](http://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](http://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](http://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](http://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

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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](http://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](http://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.