

**Script**  
**2020 Leadership Training**  
**Breaking All Barriers**

**01/SLIDE** First of all... Congratulation on this path you've chosen, whether it is your 1<sup>st</sup> time in a leadership role, your 10<sup>th</sup> time, or maybe you are just thinking about it...there is nothing that gives you more gratification and confidence in your role as a soroptimist.

I also want to you THANK you brave women for stepping forward to help us lead our members through these difficult and constantly-changing times.

Thank you for taking time tonight for some crucial training as leaders of your clubs. Hopefully, we can offer you some piece of mind and the knowledge that you do not have to do this alone. We, (the region board) have got your back.

**02/SLIDE** We have a lot of information to share with you so we will do our best to make it as clear and concise as we can. If you have any questions, please type them into the chat box on your left. We will take a pause periodically and answer some of your questions.

We also emailed quite a few handouts to have on hand with you during this PPT and at the breakouts that may also help answer some of your questions and help you find what you need to lead successfully.

If each of you will change your name to your 1<sup>st</sup> name and then type in which Breakout session you will be attending – President, Treasurer, or Other...so that I can put you in the correct breakout room. For instance, mine should read “Gov Laurie – Other”.

**03/SLIDE** Our purpose:

It is important to re-iterate the need for our clubs to act as affiliates under the Soroptimist umbrella, NOT stand alone clubs with regards to carrying out our ONE mission.

The following MUST be the purpose of each and every club:

### **03/cont**

**to pursue the vision that women and girls deserve to live free and productive lives through access to education;**

**to promote gender equality so that women and girls can live free from discrimination;**

**to create access to programs for women & girls, leading to social and economic empowerment to act in their own best interest;**

**AND to foster diversity and inclusivity in our clubs to compel women from varied backgrounds and perspectives to work together to improve the lives of women and girls.**

**04/SLIDE AND, as administrators of this incredible region...we (the board) must ALSO move forward with a purpose:**

**to ensure that clubs follow the rules associated with non-profit status that Soroptimist membership affords us;**

**to encourage those clubs in building a solid base of continuous and expanding membership while remaining non-political and inclusive.**

**To engage all members and to be an administrative support system of Soroptimist clubs; AND**

**to assist and motivate clubs in their efforts towards collective impact, the big goal and “service” to women and girls.**

**05/SLIDE SIA and our region is committed to providing an engaging, meaningful, and mission-based experience. But, of course, our members are very busy women. And serving women and girls who face obstacles like poverty, violence, gender inequality and teen pregnancy – can be a tall order...especially during a pandemic.**

05/cont

So, to make it easier to accomplish our organization's BIG GOAL - which is...“to invest in the dreams of a HALF MILLION women and girls through access to education by 2031” - SIA has developed this simple club road map for your use. Hallelujah!

In order to provide a positive club experience while helping to build our collective impact and recognition, clubs are asked to do these 5 things:

1. Programs – increase the number of women and girls your club serves by providing additional “Live Your Dream Awards” and holding “Dream It, Be It” Programs.

Our region has been at 100% participation in LYDA for at least the last 10 years and we are up to 70% participation in the DIBI program, but now they are asking us to impact more women in order to reach our BIG GOAL by 2031.

2. Membership – Grow and retain members by creating and fostering an enjoyable and civil member experience. Embrace diversity and inclusivity and increase the quality of engagement with your members.
3. Public Awareness - Gain greater recognition by promoting your club's impact through our “Dream Programs. Encourage Brand consistency throughout your media presence.
4. Fundraising - Increase funds raised to support our brand unifying Dream Programs. Strive to contribute 10 percent of funds raised locally to “Club Giving” and don't forget to donate those Founder's Pennies to help support our federation programs and awards.
5. Future – Plan how your club will support and contribute to our 2021 – 2031 BIG GOAL.

That's it! If your club does these five simple things, we guarantee you will be providing a superior member experience, fulfilling our mission and strengthening

**05/cont**

Soroptimist's global brand. Plus, you will be driving our organization to reach our BIG GOAL. Margie, do we have any questions in the Chat Box at this time?

This Club ROADMAP for success is available on the GWR website under club resources and I encourage you to share this with every member in your club.

**06/SLIDE** And how do we measure our success rate at achieving these goals as a region? By updating our "GWR Healthy Club" reports, of course.

This report was created to help us all measure if our club is doing what we should be doing to be a vibrant and successful club. It literally contains all the information SIA asks our Governor to report annually and your work has given us our region our "Outstanding Region" status – the highest-level SIA created. So, Thank you for that!

You should have received this in the handouts that were emailed. You will need to start working on these immediately. Give yourself time as you may need to look up or ask someone for some of the information.

You will need to send a copy to your DD by September 1<sup>st</sup>. Then you'll need to save that copy to assist you in filling out the report again online through our GWR website before February 1<sup>st</sup>, 2021. Writable copies are also available on the GWR website for your convenience.

**07/SLIDE** Club President's...where would we be without you. Your region wants to do everything in its power to make your job as stress-free and rewarding as possible. So, let's start with the basics. What are your responsibilities?

One of the most important things to remember is that you are your club's guide. You are there to facilitate and celebrate your club's work, ideas and visions... not to dictate.

I'm sure the minute you were on the job, you began getting organized. You do need to give yourself the time to do that before you begin the business of presiding over your clubs.

## **07/cont**

**Also, beginning and ending your meetings on time shows your members that you respect their time and efforts by not wasting it.**

**And you've already taken the first step to arm yourself with Soroptimist knowledge by taking the time to come to this training, so pat yourself on the back. You are already ahead of the game.**

**And to serve as a delegate at region conferences and represent your club at district fall meetings.**

**08 /SLIDE** You will also represent your club in the community and should always be referred to as President so and so.

**You must try to always demonstrate strong personal leadership.**

**In addition to continuing to develop your personal leadership style as club president, you must also work on developing leadership in others. This is the future of your club and sharing responsibility with other members is key to accomplishing this.**

**Look for members who demonstrate leadership potential and begin to teach them:**

- **Start by giving them responsibility for a particular part of an event**
- **Ask them to be an assistant chair of a committee**
- **Ask them to be on the board perhaps as a director or secretary**
- **At the very least, ask members to attend committee meetings and Board meetings so they see the reality of the work – it's not that overwhelming if things are delegated and people take their share.**

**Whatever you do, try to ensure that the members experience success and then point out those successes. Mentor her so she has a sounding board and someone to come to for questions. The more successful she is, the more inclined she will be to take on more responsibility and be comfortable with it.**

**09 /SLIDE** Now let's talk about some of the Administrative Responsibilities Relating to the club and the board of directors

Once again, there is too much to cover today so we are just going to highlight a few.

Recognize that the responsibility for administering club affairs is vested in your board of directors. However, the work is to be performed by officers, board members, standing and special committees, and of course members.

This goes back to several of the points made previously. This is not a one woman show. It is not a one board show. All members should be included – or some will be over-worked, and some will be so uninvolved that they lose interest.

Another point related to your responsibilities is that it is so important to plan and prepare agendas for club and board meetings, including all matters of business and promotion of SIA, region and club activities. This encourages membership participation; and helps conduct meetings efficiently and effectively

Send them out the day before the meeting. Give members time to ask for something to be added to the agenda. Your meetings will run smoother when everyone knows the agenda. And, always include a “new business” section so that some creativity and new ideas can happen throughout the year.

**10 /SLIDE** Here are some Administrative Responsibilities relating to club committees:

- Meet with committee chairs and coordinators, providing assistance and motivation for implementation of programs, and stimulating ideas throughout the year.

-As president you are actually a member of every committee. Now no-one expects you to attend every committee meeting, but you do need to give guidance and direction. Follow up with your committees throughout the year and make sure they are on track. Some clubs assign a Board member to be a Board liaison to the committee and report back to the Board the committee activities. This is a good role for the Vice President or President-elect.

## 10/cont

- You also Appoint all standing and special committees, unless otherwise directed in club bylaws

-Committees are important to all clubs. They are a way to make sure that everyone is involved. Every member of a club should be on at least one committee. It is your job to make sure this happens. Some clubs even have this as part of their bylaws.

- Sharing your views with committee chairs is fine (usually best in private), but let the chairs preside at committee meetings.

This may seem obvious, but it can be harder than it appears. As president your opinion carries a lot of weight in the club. Be sure not to overshadow the chair at meetings. Remember, guide not dictate even when that is not your intention.

And remember, you don't need to restate or summarize what has been said unless you really, really need to clarify something. This just adds time to your meetings and undermines the work of your chair.

## 11 /SLIDE There are also Administrative Responsibilities that relate to region and SIA

Ensure that all SIA and region correspondence, requests and questionnaires are answered promptly, and that club mailings are read, and the information contained is disseminated to the club.

We suggest the use of a pending file for things like this. When you get these items, drop them into a holding file or if - you are a pen and paper gal - put a note on them with the date for responding and keep them in a pending file. Then when you develop your agenda, always check the pending file and you will never forget one of these mailings.

Even better if possible, rely on your club secretary to advise you of carried over business via the minutes, or business handled by email, or recent correspondence that needs a place on the agenda. Your secretary should be trained to assist and consulted when planning your agenda.

**11/cont... And...**

- ( I can't stress this enough) Immediately after the club election, ensure that the SIA and region are furnished with the updated data regarding new officers for the annual region directory and mailing lists.

Our wonderful GWR Secretary has about a minute and a half after elections to gather all the information on 38 newly elected club leaders, put it in a professional looking document and distribute it to all the clubs. Please give Secretary Pat Box and your district director, the courtesy of a timely reply. Your lack of responses creates extra work – and none of us need extra work!

**12 /SLIDE** Now there are many more points to this job description, all of which are relevant to you. I'll tell you where to find them in a few minutes.

I urge you to take some time to sit down and read the entire Club Management Guide before the club year begins in earnest. DO NOT just toss it aside, thinking you will "look at it later." There is a good chance you won't! The worst thing that can happen is you find it after you leave office and wish that you had read it!

Nobody wants to be THAT president! Knowledge is Power – So go on with your bad self and be that Powerful, Informed President!

**13 /SLIDE** Now, knowing what you are supposed to be doing as a club president is pretty darn important!

But as a club president it is also very important that you have a good understanding of some of the things your district director does, especially those related to your club.

It is important to develop a very good relationship with your district director! She wants to help you and she is a great resource to minimize your learning curve! Keep her in your LOOP!

If you've never met your District Director, go ahead and introduce your self in the Chat feature. And of course, presidents will be meeting up with their DD at our breakout session as well.

Your District \_\_\_ Director is \_\_\_\_\_ Please make a note of her email.

## **14/SLIDE**

In the Golden West Region, the primary responsibility of a district director is to connect and communicate with the clubs in her district. This is accomplished in four ways:

- Direct communication with club presidents as necessary to share SIA & GWR information.
- Make an official visit to each club (in person or in a virtual meeting) in their district at least once during the biennium.
- Keep in mind that the region pays the district director's travel expenses for the in-person visits. If you club would like a second in person visit or you would like her to come back and serve as an installing officer, it is the club's responsibility to pay for those travel costs.
- District directors are also responsible for coordinating a fall meeting for all of the clubs in her district each year of the biennium.
- And sometimes district directors will just check in with you from time to time via email or schedule a roundtable discussion via conference calls or zoom.
- The number 1 communication tool for the region is EMAIL. You need to check your club's email often. Like every day or at least every other day. So, if there is any kind of issue you face with that protocol, you need to let us know right away so that we can figure something else out.

Communication and engagement are key, especially during these challenging times. As we have said before, a breakdown in communication just makes more work for everybody.

## **15/SLIDE DD Responsibilities for District Fall Meetings**

Under normal circumstances the director is responsible for developing the fall meeting budget, program, and creating and sending the CALL to the meeting. Well, with covid 19 and social distancing this year, that all went out the window with the bathwater. We will have more on the changes to this year's District Fall Meetings later on in the training.

**15/cont...** If you haven't hosted a fall meeting in a while, please consider hosting next year's District Fall Meeting. Just let your district director know ASAP. It really is a lot of fun for your clubs to do.

**16/SLIDE**

Fall meetings are designed to provide clubs with the most current information to assure that we are working in a coordinated manner to carry out the Soroptimist mission.

AND Fall Meetings are an excellent opportunity for new members to learn more about how our organization operates. In a perfect world, every member of every club would attend every Fall Meeting. Please encourage them to do so.

Here are 5 really great reasons your club members should attend your 2020 Fall Meeting.

1. It creates excitement for your upcoming club year.
2. They will gain a better understanding of ways your club can carry out the Soroptimist mission.
3. They will be inspired by connecting with other Soroptimist members sharing or borrowing ideas.
4. They will receive the latest information on how to implement important Soroptimist programs.
5. AND it will increase their Soroptimist IQ.

**17/SLIDE** Fall Meetings are extremely important to a club's involvement. It is so hard for you as presidents and leaders to guide members who don't have a clue as to what is going on in our organization. It is such a short weekend and so doable. Especially with us doing all 4 Fall Meetings virtually this year.

Please get you members to put these dates on your calendar now and impress upon them the importance of attending. Your members will be energized and go back to your clubs with lots of new ideas.

There will be a 1 hour "social" on Friday night, and then a 2-hour meeting on Saturday morning with region speakers and club awards that were not distributed at the cancelled Spring Conference.

**17/cont...**

**And speaking of Spring Conference...it is currently scheduled for Thursday thru Saturday, May 20-22<sup>nd</sup> at the gorgeous Twin Arrows Resort just outside of Flagstaff, Arizona...Covid guidelines permitting, of course.**

**If we are unable to have an in-person conference, then we are equally prepared to have a virtual event. We are doing tons of research to find ways to make the events almost as fun as seeing each other in person. Almost.**

**We still have so much to look forward to going forward and it has been kind of exciting planning things just a little differently.**

**18/SLIDE I'd now like to go over some of the premier programs in Soroptimist that defines who we are as an organization and drives our branding recognition. First and foremost being:**

**The Soroptimist "Live Your Dream: Education and Training for Women Award".**

**The deadline suggested for applications to be turned in to clubs in November 15<sup>th</sup>. The deadline for submission of those applications to the Region LYDA Chair (which is currently GE Margie) is February 1<sup>st</sup>.**

**If your club's LYDA Chair has not accessed your clubs account on the portal, the time to do so is now plus start getting out your applications to the public and media advertising.**

**To find out more, go to the region website to access the "Live Your Dream Club Participation Toolkit" clicking on Club Resources, and then the region documents page.**

**The "Dream It, Be It" career program for girls has been a great success for many clubs in our region and more clubs are getting on board every year. It has huge impact opportunities for teen girls and your region and SIA are looking into ways that the program can be administered virtually by the clubs if we are still dealing with covid-19 issues in 2021.**

**To help you get started, the programs tool kit is also available on the region website under Club Resources, then select region documents.**

**18/ cont...**And finally, the region Soroptimist Celebrating success award for each pillar area – program, fundraising, public awareness and membership.

Right now, you have the opportunity to brag on your clubs 2019-2020 club year (thru June 30<sup>th</sup>), EVEN if your plans were interrupted by covid-19. The deadline for submission is September 30<sup>th</sup>, which is coming up, and all must be emailed to Programs Pillar and Soroptimist Celebrating Success coordinator Linda Poindexter. Her email is up on the slide so please take note of it. We need to know what wonderful things you did last year and if your work was interrupted by covid.

**19/SLIDE** Now let's take a look at some of the resources available to you from your region:

These three publications are the “Who, What, Where, When and How” in the world of Soroptimist club leaders. I would highly recommend that you at least print out these 3 publications, put them in a notebook or on a laptop, and carry them with you to meetings.

They are all available for download from the GWR website in Club Resources, then Region documents. The Leadership Directory is the only one that is password protected for obvious reasons and the password is gwr1978.

The Club Management Guide is the nuts and bolts of running your club with detailed information about:

- Club Officers and their duties
- Club committees, including general operations to descriptions of various committees and their duties/responsibilities.
- There are also sections with information about Parliamentary Procedure and Club Protocol.
- This document is currently being updated, but it is still a valuable source for you now. The updated version should be available October 1<sup>st</sup>.

Another very valuable resource is the GWR Club Officer's Activity Checklist.

This is a month by month calendar that you can use to keep you on track and ahead of deadlines. This is definitely something that you will want to share with your board and some club committee members.

**19/cont...** And once your download it – use it! It is literally a calendar of what to do each month and what is coming up. It's as easy as that.

And finally, the password protected Leadership Directory lists all of our region Officers, Directors, Pillars, Committee Chairs and members and club presidents... PLUS dates for upcoming Fall Meetings, Spring Conferences, SIA & SI conventions just to name a few.

## **20/SLIDE**

- This pandemic has had a profound effect on our members, our membership numbers, our clubs, our region operations, and SIA Headquarters operations. We have all had to pivot and innovate.
- We have all been working very hard to develop resources to assist clubs and members as they carry on their mission-related work while staying safe with social distancing. If we are nothing else, we are creative and resourceful women.
- Dedication and innovation are what will allow us to emerge from this pandemic better and stronger than ever. With this in mind, share ONE innovative idea or change that your club has implemented as a result of COVID-19.

We are going to take a 5 min break, but when you come back, please use the chat feature to write your responses to this request.

Share at least ONE innovative idea or change that your club has implemented as a result of COVID-19.

**21/SLIDE** CLUB BYLAWS, always such an exciting and lively topic...we have some recommended best practices for making sure your bylaws are consistent with SIA requirements and reflect how your club is actually operating.

There are 2 resources to help you address both these areas:

1. SIA has a sample Club Bylaws template on their website: download and compare this template with your current bylaws. You can also compare them to our region bylaws. You should have a committee or assign

**21/cont...** someone to keep these up to date and ensure that they are being followed. Your delegate or parliamentarian might be a great person to handle this. Some clubs have their own Laws & Resolutions committee. The point is, that if you haven't updated your bylaws in 2 years, it is time to start.

- 2. The GWR Laws and Resolutions Committee exists to assist clubs with reviewing their bylaws and recommending appropriate changes. The region is requesting that any clubs that have not updated their bylaws in 2 years, to review and revise them now, and then send them to the Region Laws and Resolution Chair, Shelley Cutts. Her email is up on the slide. Please take note: [shelley.cutts@gmail.com](mailto:shelley.cutts@gmail.com)**

**A couple of issues have cropped up before where provisions for an event were not addressed in the bylaws which can create problems for the clubs.**

**Especially in times like these, our organization is constantly changing to meet the needs of members and the world we serve. The region itself will be making changes to our bylaws to make way for electronic voting as well as other things. So, take advantage of these resources.**

**Any questions in the Chat box Gov Elect Margie?**

**At this time, I will be turning over this portion of the training to our GWR treasurer, Liz Glowka. Take it away Liz!**

**26/SLIDE** Communication – see what happens when you don't communicate?

**We have to continually maintain communication with our members, our communities, our award recipients, our supporters and our donors if we are to remain impactful during these difficult times...using every media and digital platform available to us. In the "other" breakout session we will be covering some of the tools we have available from SIA, to the ingenuity of our members.**

**Communication and Engagement is the key to our survival for the next 100 years.**

**27/SLIDE** The golden west Region will continue communicating with all clubs through your @soroptimist.net email account. It can be very difficult to communicate with clubs who don't. If you are not able to log on to your account, PLEASE call SIA HQ personally and have them RE-set your account and password.

SIA will be using these emails for voting, PLUS there are a number of benefits to using your @soroptimist.net emails as your permanent club email:

**Benefits:**

- Eliminates need to change club email contact every year.
- Legitimizes your club status – An email address @soroptimist.net tells recipients that this is a professional communication and that you are indeed an affiliate of the Soroptimist organization.
- Eliminates the need for presidents or committee chairs to use their personal email for club business.
- Both SIA and GWR websites use the @soroptimist.net address to direct interested parties to your club. You could be missing out on prospective members.

Be sure to always look for the “Region News Blast” on the 1<sup>st</sup> of every month. It has the most current updates, Information, reminders and “News you can use”.

There is no need to forward the newsletter to your members unless there is something in particular you wish to point out or discuss. These are sent to every member in the Golden West Region. However, please check with your members to make sure they are indeed receiving them and let us know if they are not.

You may also notice that the “Best for Women” magazine from SIA is now being distributed electronically and this is also emailed to every Soroptimist. Again, let SIA know if members are not receiving them. You'd be surprised of the cool stuff and great ideas you can find in this magazine.

**28/SLIDE** Any other questions before we go into our prospective breakouts?

Are we ready to do that Sam? Have fun everyone and we will see you all back here in about 30 minutes.