

# *Golden West Region*



SOROPTIMIST

Best for Women

## **CLUB MANAGEMENT GUIDE**

July 2018

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# FORWARD

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Dear Club Leader:

This Club Management Guide has been compiled for your use in effectively managing your Soroptimist Club.

**Remember, this is a just a guide.**

Your club does not need to have all the elected positions listed. Your club is not required have all the committees listed. Your club does not have to follow parliamentary procedure—although if you want to get anything done, it is highly recommended!

In other words, use the only those portions of this guide that work for you and your club members!

The ultimate goal should be to make your club uniquely successful, happy and healthy!

# 1—CLUB STRUCTURE

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## 1.1 – GENERAL CLUB STRUCTURE AND PURPOSE

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Soroptimist clubs are organized with a minimum of 12 members who meet regular membership requirements. Each club maintains a charter as long as all of the requirements of the federation are fulfilled.

Clubs initiate, adopt and promote procedures and policies to attain SIA and club objectives to carry out the Soroptimist mission. Club bylaws should provide for the following:

- That the board of directors, composed of officers and board members, have administrative control over the affairs, funds and property of the club, except that of modifying any action taken by the club.
- That the president be the chief officer and direct the business of the club.
- That the president appoint all standing and special committees, unless otherwise provided for in the club bylaws and procedures.

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### 1.1.1 – FRAMEWORK

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Each Soroptimist club operates within the framework of SIA and SI adopted policies, programs and bylaws, but each club assumes responsibility for formulation of Soroptimist policies by sending its informed delegates to SIA conventions, region conferences and district fall meetings.

Clubs retain their individual character. They hold meetings, invite speakers, arrange discussions leading to research into the needs of their communities, and provide service to their communities and the world.

## 1.2 – ELECTED OFFICERS AND DUTIES

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### 1.2.1 – PRESIDENT

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#### LEADERSHIP RESPONSIBILITIES

The club president:

- assumes leadership of the club
- gives the time and effort necessary to lead and carry on the work of the club
- begins and ends meetings on time

- has, or quickly acquires, a working knowledge of Soroptimist laws, objectives, programs and policies, as well as region and club bylaws and procedures
- represents her club in the community
- serves as a delegate at region conferences and represents her club at district fall meetings
- demonstrates strong personal leadership; strives to develop leadership in others; and shares responsibility

## ADMINISTRATIVE RESPONSIBILITIES

### *Relating to the club and the board of directors*

The club president:

- recognizes that the responsibility for administering club affairs is vested in the board of directors, but the work is to be performed by officers, board members, standing and special committees, and members
- recognizes the action of the club and/or board of directors is binding until amended, rescinded or completed
- conducts the business of the club, and presides over meetings of the club and the board of directors
- gives all directives based upon club, board, region or SIA action
- plans and prepares agendas for club and board meetings, including all matters of business and promotion of SIA, region and club activities; encourages membership participation; conducts meetings efficiently and effectively
- calls special meetings of the club and board in accordance with club bylaws
- signs all vouchers for payment of bills and, in the absence of the treasurer, signs all checks unless otherwise directed by club bylaws
- orients the president-elect (if club has this position), prior to her installation, on the state of the club activities, administrative policies, and the relationship of the club to the region and SIA; and passes on files
- has a planning session with committee chairs and coordinators to provide information for the club annual report
- meets with committee chairs and coordinators, providing assistance and motivation for implementation of programs, and stimulating ideas throughout the year
- takes necessary precautions to assure the safekeeping of all pertinent club records
- arranges for a joint meeting of the incoming and outgoing boards of directors at the end of each administrative year to provide continuity

### *Relating to club committees*

The club president:

- appoints all standing and special committees, unless otherwise directed in club bylaws
- provides committees with a charge and function based upon club, board, region, and SIA action
- serves as an ex-officio member of all committees, except the nominating committee
- appoints tellers at the annual election, none of whom shall be a nominee for office
- sees that committees function properly
- shares views with committee chairs, but lets the chairs preside at committee meetings

### *Relating to region and SIA*

The club president:

- arranges for revision of club bylaws and policies, if necessary, after each SIA convention and region conference
- ensures 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
- immediately after the club election, assures that the SIA and region are furnished data, on forms provided, regarding new officers for the annual region directory and mailing lists. Reports, as they occur, any changes during the fiscal year to ensure that SIA and region mail reaches proper club officers without delay.
- immediately after the club election, assures that the region governor and region secretary are furnished with the names and addresses of elected club delegates and alternates. Reports, as they occur, any changes during the fiscal year. The region must have this information in case an emergency requires a mail vote between conference dates.
- sees that the secretary or treasurer reports promptly to SIA headquarters, on forms provided, all terminations and changes of records, change of zip/postal codes, and new members, so that the membership mailing lists are kept up-to-date.
- ensures that official requests for supplies and correspondence pertaining to dues, membership records and magazine mailing lists are sent to SIA headquarters in Philadelphia.
- executes mail ballots after presenting information to the club and taking a formal vote.

#### TEN PRINCIPLES FOR A CLUB PRESIDENT

1. There is honor in being president of your club only if you serve well. Give graciously and generously of yourself.
2. You are expected to lead your club in community activities. Represent your club faithfully in community organizations and meetings.
3. You are the person to who questions relating to protocol and policy should be directed. Learn the Soroptimist laws well—be familiar with educational tools and know how to use them effectively.
4. Communicate—promptly and effectively! You are the contact through which communications flow from region and SIA officers, and committees. Read all communications immediately and reply promptly, passing along needed information to committees and members.
5. Make your committee appointments wisely so that the talents of your club members may be used effectively in service. The appointment of these committees is one of the first duties you should complete.
6. Prepare a president's planning calendar. Successful leadership depends on careful planning.

7. Abide by Soroptimist law, for it is your protection. Work for its orderly change if necessary, but never place yourself above the law.
8. Encourage club members to attend district meetings, fall meetings, region conferences, and SIA and SI conventions so that all members will have a better opportunity to know and share Soroptimist.
9. Remember to use region committees, for they are knowledgeable, and their experience can provide great assistance.
10. Be sensitive to the needs and wishes of your club members. It is the club members, and not you, who should arrive at the decisions.

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### **1.2.2 – PRESIDENT-ELECT**

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The office of president-elect is an option as set forth in the club procedures.

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### **1.2.3 – VICE PRESIDENT(S)**

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#### **RESPONSIBILITIES**

The vice president, in the absence of the president, shall perform the duties of the president. (If a club has more than one vice president, the vice presidents in the order of their rank shall perform the duties of the president and such additional duties as the club or the board of directors may require.)

The vice president should assist the president in any way possible. Under the direction of the president, she could oversee committee activities that are assigned to her. She should familiarize herself with all Soroptimist matters on club, district, region, SIA and SI levels, and attend appropriate functions.

The vice president may chair the Service Committee.

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### **1.2.4 – TREASURER**

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#### **RESPONSIBILITIES**

- Perform duties as set forth in the club procedures
- Receive, record and deposit all funds
- Furnish financial reports, as required by the board and the club
- Prepare statement of receipts and disbursements for the fiscal year and arrange for an audit (to be completed by August 15 if the club's fiscal year is July 1—June 30).
- Pay bills for authorized, budgeted expenditures
- Obtain board approval for payment of bills not covered by the budget
- Send notices of financial obligations to members



- Provide for the president and board a monthly report of members whose financial obligations have not been met.
- Place orders for supplies (including the past president's pin) from headquarters
- Prepare and file required tax reports
- Report membership changes - new members, reinstated and transferred members; terminations; changes of name and address. Also report changes in president or treasurer during the club year

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## 1.2.5 – RECORDING SECRETARY

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### RESPONSIBILITIES

The secretary shall keep the minutes of the club's business and board meetings; maintain a roll of membership; submit the minutes of club business meetings and the recommendations of the board to the club, and send out notices and correspondence that do not fall under the responsibilities of other officers.

### MINUTES

(See also Preparation of Minutes and Sample Minutes)

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

1. the kind of meeting
2. the name of the group
3. the date and place of the meeting
4. whether the regular presiding officer and secretary were present, or, in either's absence, the name of the substitute
5. whether the minutes of the previous meeting were approved
6. all main motions, points of order and appeals—whether sustained or lost—and all other motions that were not lost or withdrawn
7. the hours of the meeting

Minutes should reflect action taken by the group, rather than what was discussed by any one member. The minutes should reflect what the club did. Generally, the name of the person who introduces a motion is recorded, but not the name of the person who seconds a motion.

The secretary is responsible for the minutes of the board meetings. The board minutes should contain the same essential information as the business meeting minutes. In addition, the board meeting minutes usually reflect the names of board members who were present and those who were absent.

The minutes of the club are available to all members, and the secretary should allow any member to inspect the minutes at reasonable times. When a committee needs any record of the club for the proper performance of its duties, the secretary should provide such records to the chair.

The board meeting minutes are available to board members only, and a club member who is not a member of the board does not have the right to inspect the minutes of the board, unless the board authorizes such an inspection.

At the regular business meeting, the secretary should provide the minutes of the last meeting and any business conducted at any meeting since that last business meeting. She should also report any recommendations from the board meeting.

The minutes should be typed, signed and inserted into a binder. As the minutes are the permanent record of the club, they should be preserved in an organized and readable form.

## MEMBERSHIP ROSTER

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

## GENERAL DUTIES

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

The secretary should bring the following to each business meeting:

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

## PREPARATION OF MINUTES

Using an agenda, the secretary should take notes in the order that business occurs.

## TREASURER'S REPORT

The treasurer's report is always ordered by the president to be "filed for audit".

## CORRESPONDENCE

Record items briefly. If important, make the piece of correspondence a part of the minutes by attaching it and so indicating in the minutes. Record any action taken.

## REPORTS

Standing committees—give the full name of the person and the committee. Record the facts briefly, and if appropriate attach a full report.

## UNFINISHED BUSINESS

Record only facts, not opinions. Record all motions—verbatim. Indicate the name of the motion maker. If the motion is lengthy or not understandable, ask the president to have the maker repeat or write out the motion.

## NEW BUSINESS

Follow the same procedures as for “unfinished business.” The secretary should give a copy of the minutes to the president as soon as they are prepared.

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### 1.2.6 – CORRESPONDING SECRETARY

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The office of corresponding secretary is an option as set forth in the club procedures.

#### RESPONSIBILITIES

The corresponding secretary has charge of the general correspondence of the club, that is, correspondence not related to the work assigned to some other officers or committee. Each officer writes the letters relating to her own work and the chair of each committee attends to the correspondence of that committee. Written notification concerning a proposed member would properly be the duty of either the corresponding secretary or the membership committee chair, such decision to be made by the club.

All communications relating to the general work of the club received by any other officer should be referred to the corresponding secretary for reply. Letters received by the corresponding secretary relating to work of another officer may be referred to that officer for reply, or the corresponding secretary may obtain the desired information and answer the letter herself. In general, correspondence in her charge includes sending out notices of meetings, and communications that have been ordered by the club or established by custom.

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### 1.2.7 – DIRECTOR(S)

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#### RESPONSIBILITIES

The officers and directors constitute the board of directors. The number of directors and their terms of office may vary at the discretion of the club and should be identified in the club bylaws. The board shall have administrative control over the affairs, funds and property of the club, except that of modifying any action taken by the club. It shall authorize payments from club funds; act upon invitations to membership, resignations, terminations and disciplinary matters; receive such reports of committees as may be necessary between business meetings of the club; and perform such duties as the club or bylaws may require.

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

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## 1.3 – CLUB DELEGATES & DUTIES

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### 1.3.1 – CLUB DELEGATES

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#### ELECTION

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

#### QUALIFICATIONS

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

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

#### RESPONSIBILITIES

##### Before the Conference

- Be certain credentials have been properly filed.
- Be certain that registration fees and all financial obligations of the club to the region and the SIA have been paid. Only delegates from clubs in good standing may be seated at a region conference or SIA convention.
- Study the Call to Conference.

##### The President should:

- allocate time at a club business meeting for discussion of topics on the agenda so that the delegate(s) may have the benefit of the majority opinion of the club.
- schedule time at a post-conference/convention meeting for the reports of the delegates—this should be as soon as possible after the conference/convention.

##### During the Conference

- Register promptly—be on time and attend all sessions.
- Know the standing rules and observe them.
- When recognized by the presiding officer, give your name and the name of your club.
- Take accurate notes for reporting to the club.

### After the Conference

Prepare a report on the meeting. Include the following.

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

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## 1.4 – APPOINTED POSITIONS

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### 1.4.1 – HISTORIAN

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#### RESPONSIBILITIES

The club historian, appointed by the president, is the custodian of the permanent club records. As custodian, the club historian preserves the minutes and all important reports and papers that the club has ordered “placed on file”. While each officer/committee chair should have charge of the current year's records pertaining to that office or committee, the club historian should have intellectual custody, if not physical custody, of all records.

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### 1.4.2 – PARLIAMENTARIAN

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- The club president appoints the parliamentarian. She is never elected. She should have a good understanding of *Robert's Rules of Order Newly Revised*.
- It is the duty of the parliamentarian, when requested, to advise the president on parliamentary law. She does not have the right to express an opinion unless she is asked to do so by the presiding officer.
- The parliamentarian gives an opinion, but a ruling is made by the presiding officer
- A Soroptimist, serving as a parliamentarian at a club meeting, may retain her vote as a member.

## 1.5 – NOMINATIONS AND ELECTIONS

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

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

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

# 2—FINANCIAL MANAGEMENT

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## 2.1 – GENERAL INFORMATION

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### 2.1 – FEDERAL REQUIREMENTS (APPLICABLE TO CLUBS IN ALL STATES)

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Soroptimist International of the Americas is a nonprofit 501(c)3 organization. This section is to assist clubs in understanding the requirements of being a non-exempt charitable organization. It is recommended that clubs access detailed instructions which can be found at [501\(c\)3 Organizations: Fundraising, the IRS and State Law](#)

A 501(c)3 organization is a corporation, trust, unincorporated association, or other type of organization exempt from federal income tax under section 501(c)3 of Title 26 of the United States Code.

1. Soroptimist Clubs must have satisfied their tax exempt status with the IRS as an exempt organization by having either:
  - Filed the appropriate documents with headquarters and are included in the group exemption granted by the IRS to exist as a 501(c)3, or
  - Filed the necessary paperwork with the IRS and obtained tax exempt status individually as a club.
2. Soroptimist Clubs are required to:
  - Annually file with the IRS either a Form 990 (990EZ, 990-N, or standard 990)
3. Soroptimist Clubs shall be formed particularly to:
  - Promote the advancement of women through volunteer service to the community;
  - Serve as a global voice on issues of important to women; and
  - Engage in any other lawful activities that further the exempt purpose of the club.

### 2.2 – BANK ACCOUNT

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Soroptimist Clubs are no longer required to keep separate bank accounts for Service Funds and General Funds, however;

- Clubs should ensure that their financial activity supports the goals of a charitable organization.
- Each club shall be non-profit, noncommercial, nonsectarian and nonpolitical.
- Clubs should establish one budget which accurately reflects mission and activity.
- Club dues should be established to cover general operating expenses.
- Clubs must be able to document how funds donated for specific projects are spent.
  - Major portion of the income realized from fund-raisers should be spent to provide

- community service in alignment with the Soroptimist mission.
- If proceeds are earmarked or specifically allocated the wishes of the donor must be satisfied and the club must be able to document how the funds were used.
  - Clubs may use some of the profits from fund-raising efforts to fund Soroptimist education, provided that this was communicated in the marketing of the event.
  - No part of any net earnings of any club shall be used to benefit a member or a member's organization that does not align with the purpose and mission of the club.

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### 2.3 – INCOME TAX RETURNS & REPORTING

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Federal & State Tax returns are required for all clubs. Additionally, there are reporting requirements for payment to individuals, and conducting raffles. The forms and requirements vary depending on yearly gross receipts and per state. Please refer to the [Treasurer's Manual](#) for details.

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### 2.4 – INSURANCE

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The club Insurance Overview and Handbook is available on the SIA website or can be accessed using the following link:

[Insurance Handbook](#)

**Please review in detail as all clubs must adhere to insurance requirements and restrictions.**

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### 2.5 – WORKING WITH YOUTH & INSURANCE

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Soroptimist International of the Americas is committed to providing a safe and secure environment for youth participating in our project activities at all levels of the organization – club, region and federation. When we work with youth, their care and welfare are entrusted to us.

SIA Standards for Projects Involving Youth are available on the SIA website or can be accessed using the following link:

[Procedures for Working with Youth](#)

**Please review in detail as all clubs must adhere to insurance requirements and restrictions.**



# 3—CLUB COMMITTEES

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## 3.1 – GENERAL INFORMATION

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### 3.1.1 – GENERAL

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

Any Soroptimist may serve as a chair or member of any committee, according to club bylaws. It is often appropriate that a Soroptimist serve on more than one committee at club level. She may also serve on a region or SIA committee.

A committee receives its authority and responsibility from Soroptimist law, from direction from the president, board and club, and from previous committee activities and recommendations. Each committee's terms of reference should be briefly defined.

To function effectively at club level, each committee chair and members should have a good understanding of region and SIA programs and operations, specifically as they apply to the particular committee's concerns.

Club committees that correspond to region committees should keep in close contact and work cooperatively with the corresponding region committee chairs.

### 3.1.2 – PROCEDURES FOR CLUB COMMITTEE APPOINTMENTS

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- The president appoints committees annually. Appointments should be made within 30 days after election of the president.
- In some cases it may be wise to appoint a vice chair so that if the chair does not (or cannot) function, no interruption in committee functioning will result.
- The president should consult with the chair in choosing committee members.
- Every member of the club should serve on one or more committees.
- No one member should serve as chair of more than 2-3 committees, or continue to serve on the same committee year after year.

- The treasurer should serve as an ex-officio member of the finance committee, but not as the chair.

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### 3.1.3 – PROPER FUNCTIONING OF A COMMITTEE

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- Within 30 days after her appointment, each chair shall call a meeting of her committee to prepare a plan and a budget (if necessary) for the year. She shall make such reports as the club members, president, the board of directors and the club procedures may require. The committee budget, if any, is submitted to the president for club approval.
- The chair gives ample notice to each member when calling a meeting of her committee.
- The chair conducts the meeting and is free to present her own ideas, but each committee member must be given an opportunity to participate.
- A record of the meeting should be kept, and committee recommendations should be written and given to the president.

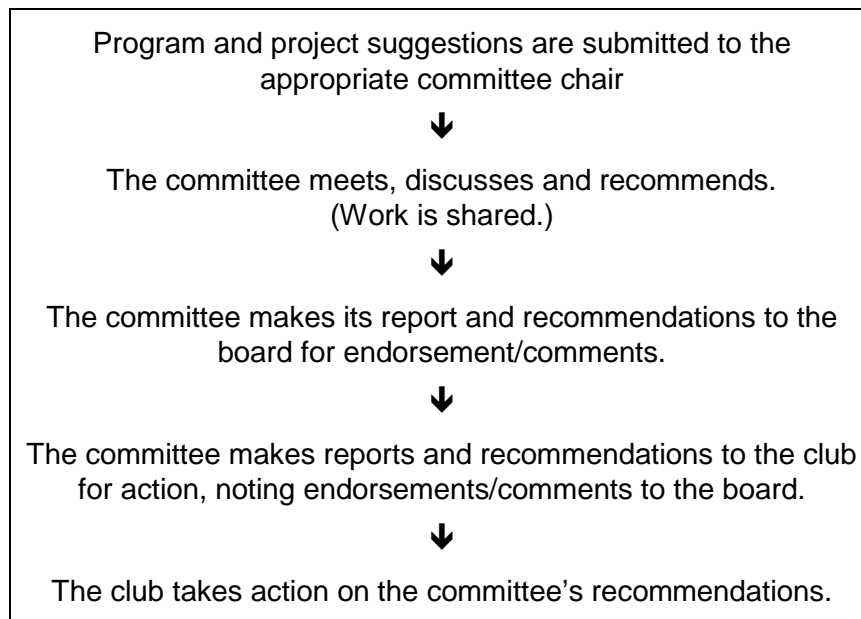
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### 3.1.4 – PROPER CHANNELING

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

The following procedures should be used:



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### 3.1.5 – RESPONSIBILITIES OF COMMITTEES

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#### CHAIR

- Organizes the committee.
- Outlines a broad plan of work and a budget, if necessary; committees should not exceed their budgets without prior approval. All funds collected by any committee shall be paid to the treasurer.
- Issues calls for meetings.
- Prepares an agenda for the meeting.
- Presides over and leads discussion.
- Assigns jobs to committee members.
- Appoints the committee secretary, if necessary; checks and approves the minutes.
- Coordinates work with other club committees.
- Together with the secretary, prepares the annual report.

#### MEMBERS

- Attend committee meetings.
- Participate in committee decisions with preparedness and objectivity.
- Accept willingly and carry through on work assignments.
- Support committee decisions.

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## 3.2 – CLUB COMMITTEES

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Each club may have a committee for any of the following functions (and others not addressed in this section, but appropriate to club operations). For those committees with various technical aspects, separate or subcommittees may be established.

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### 3.2.1 – FINANCE COMMITTEE

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#### RESPONSIBILITIES

The finance committee is in charge of devising the budget. This committee must be familiar with objectives of the organization; financial requirements of the club; and adopted financial procedures and policies.

The finance committee shall submit the proposed budget for the succeeding year at the business meeting in April or May (if the club year is July 1—June 30). This budget, subject to

revisions, shall be presented at the designated annual meeting or as established by club procedures. The committee should report at least quarterly on the state of the budget.

## BUDGETING

Budgets, a tool of good management, are made to establish (in advance) the objective and/or result of the budget period; to provide a means of coordinating the various activities of the organization; and to show whether the objective is being realized and where changes may be made to attain the objective. Unbudgeted items should be referred to the finance committee for consideration.

The finance committee may also want to prepare a comparative budget with the previous club year's income and expenditures.

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### 3.2.2 – MEMBERSHIP COMMITTEE

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## RESPONSIBILITIES

The membership committee has several components: recruitment and retention of members, leadership training, Soroptimist orientation, and development of new clubs (cooperating with the region and SIA in establishing new clubs). Responsibilities for these components should be divided among committee members, unless club bylaws provide for separated or subcommittees.

Members of the committee should be well versed in all phases of Soroptimist, and should be enthusiastic and creative. The continued growth and strength of the club depend greatly on a well-informed membership.

## PLANNING

Early in the club year, the membership committee should meet to develop a plan. The committee should report progress regularly to the club members.

## LEADERSHIP

All clubs should focus on preparing club members for leadership within the organization and in their own communities. To promote leadership within the club, members should be encouraged to participate on committees, since this is the training ground for developing leadership abilities.

Leadership programs on how committees can function effectively, how to work with people, and how to make changes in procedures/policies, should be scheduled at the club level. Setting goals and objectives, motivating others, anticipating and dealing with problems, and carrying through with responsibilities are topics that should be included in leadership programs.

All club members, and in particular officers and committee chairs, should be encouraged to attend region conferences, district meetings and leadership training workshops. The membership committee should be knowledgeable about materials prepared by the region membership committee as well as materials available from SIA.

## SOROPTIMIST ORIENTATION

All clubs need to educate members about the heritage, purpose, objects, policies and programs of the organization. Soroptimist education is the process by which members become active, interested and participating Soroptimists.

Soroptimist education begins with prospective members. When a new member is inducted, she should be presented with a member pin and club orientation materials. The induction ceremony should be inspiring and dignified. Enthusiasm for Soroptimist is very important here. The membership committee members should assist in every way in the orientation of the new members. New members should feel welcome. They should be encouraged to present their ideas, to use their particular talents, and to participate in all club discussions and activities. New members should immediately be assigned to a committee, so that they become involved in club activities.

The membership committee should schedule, through the club president (or meeting planning committee), regular short presentations on Soroptimist education. These programs should be conducted once a month (if possible) or perhaps as two or three-minute “mini-education” sessions at each meeting. This would give each member an opportunity to present some pertinent facts about the organization.

Don't forget to share the region News Blast and SIA messages to all members of your club!

Encourage members to attend district meetings, region conferences and SIA conventions, since there is no better way to become educated about Soroptimist. Knowledge about the organization results in membership pride, which in turn leads to a stable membership. Individual pride in membership is generated through the personal contribution the member makes to the club's achievements. Club leadership should recognize individual members for their contributions to club activities.

### SUGGESTED ORIENTATION TOPICS:

**HISTORY**— The beginning of the Soroptimist organization and its growth, both in strength and service.

**ACHIEVEMENTS**— Share accomplishments from clubs around the world and at the community level. This creates a feeling of great pride within the membership.

**LAWS**— The basic foundation of the Soroptimist organization. They govern our actions and protect our rights and privileges. Each Soroptimist should share in the responsibility of making and upholding the laws.

**STRUCTURE**— Teaches the composition and scope of the Soroptimist organization. It also covers the administrative structure.

**AIMS AND IDEALS**— Teaches the purpose of Soroptimist, acknowledges the responsibilities of citizenship and the duty of discharging obligations.

GOALS AND OBJECTIVES— This is important knowledge for all Soroptimists.

RESPONSIBILITIES OF MEMBERSHIP— Attendance, participation and involvement

PROTOCOL AND STANDING RULES— Customs and rules by which meetings are conducted.

FINANCIAL RESPONSIBILITIES— How money is used and the financial obligations of members.

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### **3.2.3 – LAWS AND RESOLUTIONS COMMITTEE**

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#### **RESPONSIBILITIES**

The laws and resolutions committee is responsible for reviewing all proposed amendments to club bylaws and procedures and for making recommendations to the club.

The committee should review the club bylaws and procedures annually and prepare any amendments considered necessary. It should also prepare (for presentation to the club) any amendments as requested by the club's board of directors.

The committee is considered the authority on laws, and should assist all officers, committees and members in interpretation of the laws. The appropriate region or SIA committee should be consulted about additional clarifications.

#### **CLUB BYLAWS**

Each club should adopt bylaws. Each club is free to adopt bylaws suitable and acceptable to the club, providing they are not in conflict with the SI Constitution, SIA Bylaws, SIA Procedures, and/or the region's bylaws.

Club bylaws may be amended as stipulated in the club bylaws. Suggested procedure is that they be amended at any regular club business meeting by a two-third vote of the members, provided notice of the amendment has been given at the preceding business meeting.

Sample club bylaws are available on the SIA website— [Sample Club Bylaws](#)

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### **3.2.4 – MEETING PLANNING COMMITTEE**

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#### **RESPONSIBILITIES**

The meeting planning committee assists the president in arranging topics, programs and activities for club meetings throughout the year. This is one of the most important functions in a club. Regular business meetings should include time for Soroptimist orientation and/or leadership training, and appropriate presentations by other committees: Finance, membership,

laws and resolutions, and fundraising. These can be short, frequent presentations on an “as needed” basis.

## PROCEDURE

Plan ahead. Organize the club calendar for the upcoming year, taking into account the events and requirements that take place at predetermined times.

Distribute the club calendar to all members, with programs, topics and activities clearly marked.

Involve all members in club meeting activities throughout the year: ask different members to introduce and thank speakers, to lead seminars, etc. A member who is involved derives much more satisfaction from her membership.

The meeting planning committee performs the major part of its work at the beginning of or prior to the start of the club year. From then on, the president looks to it to handle the details of arranging for speakers, videos, presentations, etc.

## PROGRAM SPEAKERS

Please note the following:

- Invited speakers should be given the following information: time and place of meeting, length of talk, and information about the club and its members.
- Make necessary arrangements for audio-visual equipment, if needed
- Obtain biographical material for a brief introduction of the speaker
- Arrange transportation for the speaker (if necessary) and meet her/him at the door.
- Arrange for the speaker to be seated at the head table, if there is one. If special guests will be attending, notify the person in charge of guest tickets.
- Write the speaker a thank-you note.
- At the conclusion of the presentation, escort the speaker from the meeting.
- For publicity purposes, send the public awareness committee chair complete information about the speaker one month before the meeting.

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### 3.2.5 – PUBLIC AWARENESS COMMITTEE

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This committee works toward favorable public relations, in accordance with the public awareness program of SIA. To avoid confusion, one person should be responsible for media relations.

Complete information on how to establish and manage a club public awareness program can be found on the SIA website, <https://www.soroptimist.org>

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### **3.2.6 – FUNDRAISING COMMITTEE**

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#### **RESPONSIBILITIES**

The fundraising committee suggests methods of raising money and directs fundraising projects approved by the club. Consideration can be given to raising funds in one fiscal year for use in the next year's service projects. The fundraising committee submits (for club approval) fundraising projects, specifying investment of time, money required and estimated net profit.

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### **3.2.7 – SERVICE COMMITTEE**

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#### **RESPONSIBILITIES**

The vice president or president-elect, as designated in the club bylaws, may chair the service committee. Club service, whether within the community, the country or internationally (including programs that receive SIA funding) falls within the jurisdiction of the service committee. The committee proposes the manner that the club should implement these activities, and supervises and directs these efforts.

The service committee may work with the region program committee to implement the objects of the SIA by promoting the activities, programs and projects adopted by the SIA. In addition the service committee may be responsible for overseeing involvement with sponsored organizations: Sigma Societies (for college students) and "S" Clubs (for high school-age youth), and Venture Clubs (for young business and professional women).

Early in the club year, the service committee should submit a list of its projects and an estimate of funds that will be needed. This and other information about income and expenses will provide the basis for preparing a club budget.



# 4 — PARLIAMENTARY PROCEDURE

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## 4.1 – PARLIAMENTARY RULES

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Parliamentary rules ensure accuracy in business, economy of time, order, uniformity and impartiality, and enhance the transaction of business. All members should have the privilege of voicing their opinions, and sessions on “how to participate” should be scheduled periodically.

In accordance with SIA bylaws, *Robert’s Rules of Order Newly Revised* is the parliamentary authority.

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### 4.1.1 – PARLIAMENTARY HINTS

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#### PRESIDING OFFICER:

- It is your responsibility to keep order and expedite business. Start the meeting on time. If no quorum is present, business will then be held over until a quorum is present.
- The treasurer's report is never accepted. Ask if there are any questions and then place it on file for audit. The audit report is accepted.
- The chair is entitled to vote when the vote is by ballot. The chair may vote to break a tie or to create one, but cannot be compelled to do so.
- DO state the method of voting (aye and no, show of hands, ballot).
- DO state whether the motion is carried or lost.
- DO request all remarks be addressed to and through the chair.
- DO know where to find the answers quickly when necessary.
- DO devote some time at every meeting for membership input.
- DON'T stand during debate or when a report is being given.
- DON'T take part in debate while you are in the chair. If you must speak, turn the chair over to the (first) vice president. Do not return to the chair until the vote has been taken.
- DON'T be rushed into hasty decisions; take time to become informed.
- DON'T lose your calmness, objectivity, or impartiality.
- DON'T forget to relax and enjoy your leadership. The membership will respond favorably to your attitude.

#### MEMBERSHIP RIGHTS:

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

## MEMBERSHIP RESPONSIBILITIES:

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

## THINGS TO REMEMBER:

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

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## 4.1.2 –MOTIONS

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To have effective action-oriented meetings, members need to learn correct parliamentary procedures. In the two columns below, notice the motions to make to accomplish the results you want:

<b><u>PURPOSE</u></b>	<b><u>MOTION TO MAKE</u></b>
Set time for meeting	I move that we adjourn to meet at...
If the adopted program or order of business is not being followed	I call for the orders of the day
Enforce the rules	I rise to a point of order
Reverse the decision of the chair	I appeal from the decision of the chair
Change rules of debate temporarily	I move that the debate be limited (or extended) to...
Prevent a new vote on a question that has been voted on	I move to withdraw...
Object to the consideration of any principle motion	I object to the consideration of...
Set aside temporarily to take care of an emergency	I move to lay on the table the motion regarding...
Bring before the assembly a question that has been	I move to take from the table the motion tabled regarding...
Stop debate and bring a vote on the motion immediately	I move the previous question
Defer action on a question until certain time	I move to postpone consideration of this action until...
Prevent action or suppress a question	I move to postpone indefinitely the...
Have a small group or committee study or take charge of a matter	I move to refer the motion to...
Change a motion before adoption	I move to amend by...
Bring a subject before the assembly	I move that we...
Obtain a new vote on a question that has been voted upon	I move to reconsider the vote on...
When an assembly wishes to annul some action it has previously taken and it is too late to reconsider the vote	I move to rescind...

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### 4.1.3 – EIGHT STEPS TO ACTION

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

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### 4.1.4 – AMENDING A MOTION

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

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

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

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

Special orders	<p><i>“The question on _____ was postponed and made a special order for this meeting. The question is on _____.”</i></p>
<p>Unfinished business and general orders. Any general orders not taken up at the last meeting are now taken up.</p>	<p><i>“The question on _____ was postponed to this meeting.”</i></p> <p><i>“The question is on _____.”</i></p> <p><i>“The question on _____ was postponed to the last meeting, but due to lack of time was not disposed of; therefore, the question is on _____.”</i></p>
New business	<p><i>“The next business in order is new business. What is the pleasure of the assembly?”</i></p>

# 5—CLUB PROTOCOL

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## 5.1 – SOROPTIMIST CUSTOMS

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- By custom, wear the membership pin on the left side, close to the heart
- Attend meetings regularly
- Be on time for meetings
- Address the presiding officer as president, if the vice president is presiding, by her title followed by her name, e.g. “Vice President Mary.”
- Address another Soroptimist by her first name.
- Do business with Soroptimists on a business basis, expecting no favors or special treatment.
- Pay your own way, unless you are invited as a guest or as a speaker.
- Welcome visiting Soroptimists and guests at each meeting.
- Disagree politely and keep informality within the bounds of fellowship and parliamentary procedure.
- Protocol promotes orderly procedures. Personal friendships, likes and dislikes cannot matter in official life. Always remember that you honor the office a person holds...not the person.
- Use correct terminology:

We are Soroptimists—not Sorops.

We are members—not sisters or girls.

We are clubs—not chapters.

We are a SIA—not national or federal.

We have a pledge—not a creed or motto.

We attend a club or district meeting, region conference, federation or international convention.

We elect region officers—not regional officers.

- Use correct names:

Soroptimist International of (name of your club)

Soroptimist International of the Americas

Soroptimist International of Europe

Soroptimist International of Great Britain and Ireland

Soroptimist International of South West Pacific

Soroptimist International

**Note:** Should an occasion arise when you do not know the correct protocol, you will find that a gracious, cooperative attitude is most acceptable.

- The correct method of self-introduction is:

Member's name  
Member's title in her firm or business  
Name of firm or business  
Slogan—if used by your club

- Proper Introductions:
  - If there are a number of dignitaries present who are to be introduced, but are not expected to speak, begin with the highest-ranking guest.
  - If guests are expected to say a few words, then begin with the lowest ranking guest.
  - While the guest speaker may be introduced when other guests are introduced, a formal introduction should be made just prior to the address.

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## 5.2 – SOROPTIMIST PROTOCOL

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### 5.1.1 – PROTOCOL FOR SEATING AND RECOGNITION OF OFFICERS

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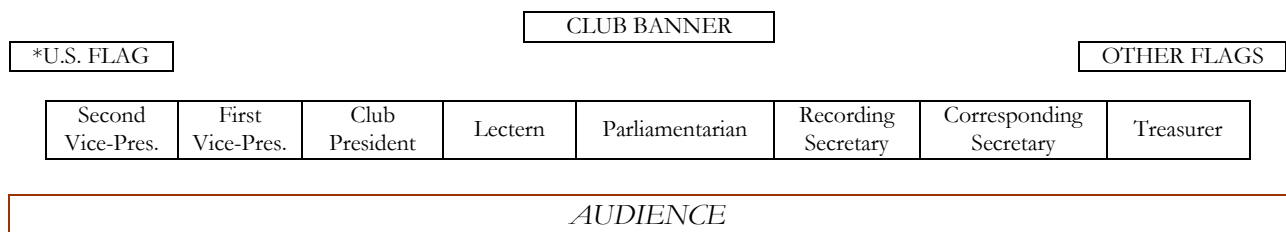
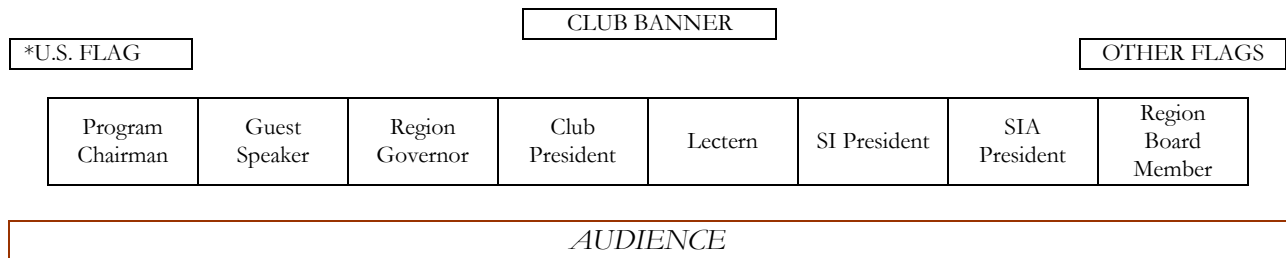
#### CLUB

- A club president is recognized as chief officer and host for the club. When not presiding, she should be seated in a place of honor at any club meeting or function. When presiding, she is seated in the center; the guest speaker is seated to her right; and the program chair is seated to the right of the speaker (or honored guest). Other special guests and club officers should be seated to the left of the president. The region governor should be seated to the right of the president.
- International officers, SIA officers, SIA board members, and region officers are seated in positions of honor according to rank.
- An international officer, SIA officer, SIA board member, or region officer or Board member is recognized as such at any formal function of her own club. Otherwise, she is recognized as any other member of her club.

## SEATING PROTOCOL

- Club President: Center when presiding. Place of honor at all club functions.
- Region Governor: To the immediate right of the club president.
- Guest Speaker: To the immediate right of the club president; or if region governor is in attendance, to the immediate right of the governor.
- Program Chairman: To the immediate right of the guest speaker.
- SI/SIA Officer: To the immediate right of the club president, or if the region governor is present, to the immediate left of the club president, in order of their rank.
- Other Guests: Immediate the left of the club president if no SI/SIA officer is present. To the immediate left of SI/SIA officer if present.
- Clubs that have: SI/SIA/region officers or board members in their club as members recognize these officers or board members at any formal function of their club. At all other times, these members are recognized as any other member of the club.

### Soroptimist Seating Protocol Charts



\*When the U.S. Flag is to be placed in the body of the meeting room, it is placed on the right side of the room facing the presiding officer.



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## 5.1.2 – PROTOCOL FOR SPECIAL GUESTS

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- Special guests include region or SIA officers, board members, region committee chairs, and community leaders. Issue invitations well in advance of the meeting or event and provide as much information as possible in the first communication to make it easy for the guest to accept your invitation. Include all the pertinent details, occasion, date, time, place, and what the guest is expected to do.
- Offer to reimburse costs of transportation. Complement all meals, not just for the occasion. Include breakfast if staying overnight or lunch if travel time requires it.
- When inviting the guest to speak, include the topic preferred, approximate amount of time allotted on the program, a general outline of the total program, if it is formal, informal, club members only, mixed audience.
- When the invitation is to an installing officer, have the incoming officer list ready along with any club theme or color scheme ready to send upon acceptance by the installing officer.
- Offer complimentary accommodations (if necessary), asking the guest of her/his desires...one bed, two beds, non-smoking, etc. If accommodations are offered in a private home, give the guest a choice of the private home or motel/hotel with gracious terminology to help make the choice.

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## 5.1.3 – INTRODUCTIONS

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**Dignitaries** Introduce dignitaries who will not be speaking beginning with the highest-ranking guest. Introduce dignitaries who will be speaking beginning with the lowest ranking guest.

Introduce actual office holders in attendance first over those representing the office holder not in attendance, i.e. Mayor Bill (actual office holder) is in attendance and should be introduced first before the person representing Mayor Jean, who is not in attendance.

**Order of Introduction:**

**Federal**  
Introductions begin with highest-ranking guest such as senators then congressmen, followed by federal judges.

**State**  
Introduce the executive officer first, such as the governor or the governor's representative, followed by the secretaries, the state senators, the state assembly members, and state judges.

**County**  
Introduce any county elected officials first beginning with supervisors, county treasurer, and school superintendents, followed by county commissioners.

**City**

Introduce mayor, council members, city clerk, elected officials such as city commissioners, city manager and local judges, followed by elected board officials such as school board members, water board members, etc.

**Soroptimist**

The introduction of Soroptimist members comes last and begins with the highest-ranking officer.

**About standing**

Standing in recognition of officers is observed at formal openings of conferences or conventions only. The custom of standing extends to SI officers and SIA officers at conventions, and to SI officers, SIA officers, and region governors at conferences.

**Yourself**

Stand and state:

(Name)

*Jane Doe*

(Club)

*Soroptimist International of (club name)  
(ONLY if away from home club)*

(Your Title)

*Owner/Baker*

(Name of Company)

*Happy Dough Woman Bakery*

(Slogan)

*Baking keeps you rolling in dough*

*Do not precede any of the above with "My name is," "I am," or any extra words.*

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**5.1.4 – FLAG ETIQUETTE**


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

*The Pledge of Allegiance to the Flag: "I pledge allegiance to the Flag of the United States of America, and to the Republic for which it stands, one Nation under God, indivisible, with liberty and justice for all.", should*

*be rendered by standing at attention facing the flag with the right hand over the heart. When not in uniform men should remove any non-religious headdress with their right hand and hold it at the left shoulder, the hand being over the heart. Persons in uniform should remain silent, face the flag, and render the military salute.*

Based on this section of the flag code, while not specifically prohibited, clubs are advised to refrain from reciting the pledge of allegiance unless a flag is present.

# 7 — CEREMONIES

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## 7.1 – INDUCTION OF NEW MEMBERS

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Inducting a new member should be impressive for the new Soroptimist, and should serve as a time for all club members to reaffirm what Soroptimist membership means.

A brief statement as to the organization's international scope, its aims, purposes, programs, and the responsibilities of membership is most appropriate. Share with the new member the meaning of the emblem and the proper way to wear it. Introduce the new member to the other club members. Present her with and explain a packet of Soroptimist educational materials.

Suggested language for inducting new members can be found at [Induction of New Members](#)

Download and print a copy to add to this guide!

## 7.2 – INSTALLATION OF CLUB OFFICERS

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The main purpose of the installation is to impress the new officers\* with their responsibilities and the importance of their work. It should be done so that new officers re-dedicate themselves to the objectives of the club, and so that the other club members will be inspired to further the work of the organization. Installations should, as much as possible, be personalized to fit the club. They should be dignified, but originality, spontaneity and humor will help to make them memorable.

Suggested language can be found at

[Installation of Club Officers](#)

Download and print a copy to add to this guide!

\*Club delegates are not officers but can be included in the ceremony if the club so chooses.