

## HOW TO BE A LEADER – Luncheon presentation

### SLIDE 1 -

First, congratulations and thank you for being here today. Your presence means that you have stepped forward – or been pushed forward - to either be a leader for your club this year or you are thinking about taking that leap in the coming years.

A couple of years ago, I walked into the scariest place on earth - Charming Charlies!

### SLIDE 2 – Charming Charlie

Has anyone been there? (Inexpensive jewelry store with items grouped by color)  
When I first walked in, I was so overwhelmed that I froze, then I walked through the store and left without buying anything.

Another example...how many types of breakfast cereal are sold in the United States? 387. Over 100 types of cereal are sold in any given grocery store. If you are like me, you really do try to make healthy choices but reading all those labels???? I just walk out without buying any of them.

Did you know that there is a study that says when consumers are bombarded with choices, they actually purchase less? They are overwhelmed and would rather do without than have to make that decision. I'm betting that the same is true with information overload!

How many of you have ever opened the Soroptimist website?

### SLIDE 3 – SIA WEBSITE

Did you feel overwhelmed or confused? Did you play around or find what you wanted? Did you just put the topic in the search box and go directly to what you wanted? Did you log out and just send an email to your district director for the answer? It happens! Too much information or too many choices sometimes causes paralysis in people – and especially with people who reluctantly volunteered to be a leader and then are bombarded with information!

We have a lot of resources available through SI, SIA and GW; we provide a lot of theory and information through our websites, newsletters, club visits, LTR, Fall Meeting, Spring Conference; and we talk about meeting deadlines through a series of emails.

But, we realized that we have never literally shown you how to be organized, pick the important information and combine all the basics into a plan for your success as a

leader and your club's success for the year. We are going to plot important dates on a calendar, identify the amount of money needed, delegate the tasks to the right people, and even pull ideas from the community calendar that might tie in with topics that the Soroptimist organization wants you to focus on – ideas for programs or education snippets for your members. Once you feel confident with the basics, we are betting that you'll feel more confident to explore all the other information available!

Mandy and I are going to take the next 30 minutes or so to share some ideas on how to organize so you enjoy being a leader without being overwhelmed to the point of paralysis - or even worse to the point of giving up being a leader at all. We absolutely want your input along the way.

Many of you – one per club - were given a President's Checklist at the Presidents meeting last night.

#### SLIDE 4 – Presidents Checklist

This checklist is also on the GWR website. So pull that out if you have one. And all of you were given a one page calendar to use for today. So pull that out.

After the President's Checklist...the next most important document is your own **club bylaws** and **standing rules/procedures**.

#### SLIDE 5 - bylaws

They are literally the rules established by your club to regulate itself. They are the operating manual for your club. What are some of the items that bylaws and procedures cover?

- Members; Officers; Nominations and Elections; Meetings; Board of Directors; Committees; Dues, Fees and Assessments; Parliamentary Authority; Dissolution
  - official committees you must have and their duties,
  - rules regarding your funds,
  - how you determine a quorum – parliamentary procedures state that your voting strength is normally the majority of the entire membership. However, some clubs have established that just the members present at a business may vote and the majority decision wins. Your bylaws should not limit your ability to act – if you have members who don't attend, then change your bylaws so your club can still vote.

The next document to review is your **club's strategic plan**.

#### SLIDE 6 – Strategic plan

This is nothing more than a plan for the future of your club. Often it defines where you want your club to be after a certain amount of time. For instance, if your strategic plan

says that your club members want to increase membership to 30 members by 2015, some of your energy must be directed toward membership. Therefore, the president should direct decisions and events toward the goals of the strategic plan and the mission. Did you notice that our mission has changed? Our mission is now...*improving the lives of women and girls through programs leading to social and economic empowerment.*

Another important document is found on the SIA website – it's called the **Club Management Guide**.

### SLIDE 7 – Club Management Guide

It can also be found on the GWR Leadership Guide. Again, some of you were given the Index for this document last night. You will see that it has just about everything you can think of to manage a club – including some tips for handling “problem members” – if we had any. This document details how to conduct a meeting, how to write an agenda, what should be in the minutes, where to have dignitaries sit, how members should do their introduction, when and how to use motions, and on and on.

At your first club meeting, you should review the Club Administration document with your club – so everyone knows the proper way to behave and conduct meetings. Additionally, you should detail your own expectations for your board/committee/members such as how you want their reports presented – verbal/written, deadlines for things - such as when to notify you that they want time on the agenda, and other expectations you have or need so you become a better leader.

Remember, you have a board and committees **YOU NEED TO DELEGATE AND LET THEM OPERATE WITHOUT MICRO-MANAGEMENT!** There are a bazillion ways to get from A to Z – a leader lets people build skills and be innovative without the stress and disappointment of only doing it your way.

### SLIDE 8 – board & membership approval

What takes **Board approval**? Most common legal and business matters require non-profit board approval. Some of these topics include hiring, firing, setting salaries, purchases, terms of loans, - many things that most of us don't do anyway. It also requires board approval for amending the bylaws, setting dues or fees, overseeing the fundraising program, grants, financial accountability practices and audits.

Additionally, housekeeping items can and should be approved and handled by the board. Members elect the board to make decisions and therefore are less involved with the organizational decisions that are made by the board members. Not every decision affecting the club needs to be voted on by the club.

Did you know that Governor Linda and Pillar Pam interviewed three companies before picking one to redesign and help manage our new website? At Spring Conference, the membership had approved the budget that included funds for a website. So Governor Linda and Pam, kept that approved fund amount in mind when they made choices about our website. Then at the next Spring Conference, Governor Linda and Pam did a presentation launching the website. Did they waste valuable business meeting time – and more specifically members’ time – telling you all about the three companies or why they chose one style over another? No – they told the membership the decisions they made within the approved budget and under the authority of being elected and appointed leaders for our region. You should not be wasting members’ time with housekeeping issues either. MEMBERS ELECT LEADERS AND WANT THEM TO LEAD.

Your bylaws normally state what topics must be brought before the **membership for a vote – voting usually happens during the business meeting**. Most of these topics include a change to the members’ rights or responsibilities such as: electing the board, voting, approving the budget, approving the sale or acquisition of club owned assets, approval of events and their budget, or agreeing to dissolve the corporation.

A **business meeting** provides members with the opportunity to propose ideas and to participate in forming the plans and actions of the organization. It shouldn’t be about details that waste time.

## SLIDE 9 - Agenda

The business of the meeting is conducted one item at a time and the order of these items is called an **agenda**. Setting an agenda and how to handle motions are in your Club Administration manual.

- Call to Order
- Optional: Introductions, question of the day, Soroptimist 101 education snippets
- Minutes approved
- Reports of Officers and Committees
  - Control the content and time allotted. (If they don’t have anything don’t call on them!)
- Reports of Special Committees
  - Control the content and time allotted. (If they don’t have anything don’t call on them!)
- Unfinished business (left undecided or postponed)
- New business
  - Is it Mission based – are there funds
- Adjourn

So far, you have your **bylaws, procedures or standing rules, your club’s strategic plan, the club management document** that leads you through how to run a meeting,

and you know what powers the board has and what decisions should be brought before the club. (If you have any questions, please ask any of the GWR board members or our DONAs throughout the rest of the day.)

So let's get to the fun part...plotting your club's calendar.

Let's create one big club – you are all members of the same club, and Mandy is your president. Mandy is going to use the post-it posters to help plot the **club's calendar**. You can follow along with the one page calendar you have.

### SLIDE 10 – Club Calendar

SIA and the GWR have put together a calendar of due dates and special event dates that should be the first items plotting on your calendar to ensure that you stay a club “in good standing.” The calendars can be found on the websites: **GWR** – GWR President's Checklist, and GWR Leadership Guide; **SIA** – Event Calendar, SIA presidents planning calendar. Additionally, on the SIA website are some documents that may help with identifying programs or clarifying the Soroptimist stance on community issues: they are called SIA Be It Resolved, SIA White Papers and SI Where We Stand.

**Mandy** - Members, what are some obvious events that we need to do to remain a club is good standing – and maybe win some awards! And in what month do they usually occur? Suggestions:

- Approval of club budget – July
- Submit dues to GWR and SIA along with new officer information - July
- Leadership Training Retreat - August
- Fall Meeting – October
- Spring Conference – June
- Saturday of Service – 1<sup>st</sup> Saturday of March
- SI President's Appeal/Human Rights Day – December (10<sup>th</sup>)
- Founders Day – October (3<sup>rd</sup>)
- Soroptimist Workplace Campaign to End Domestic Violence/International Day for Elimination of Violence Against Women – November (25<sup>th</sup>)
- STOP Trafficking Awareness/Human Trafficking Day (Jan 11<sup>th</sup>)
- What else?

**Mandy** - Members, what are some obvious deadlines and the month they usually occur? Suggestions:

- GWR and SIA Dues, Form 200, New Officer Forms – July 1<sup>st</sup>
- Registration for Leadership Training Retreat – July
- Registration for Fall Meeting – September
- Registration for Spring Conference – May

- 990 Form due to IRS (November)
- VRA application due to club (December 1<sup>st</sup>)
- WOA application due to club (December 15<sup>th</sup>)
- Ruby application due to club (club discretion)
- Soroptimist Celebrating Success Award (January 18<sup>th</sup>)
- VRA application due to region (January 15<sup>th</sup>)
- WOA application due to region (February 1<sup>st</sup>)
- Ruby application due to region (January 1<sup>st</sup>)
- WOA application due to SIA (April 1<sup>st</sup>)
- Club Grants for Women and Girls (March 15)
- Program Focus Reports (April 1<sup>st</sup>)
- Club Giving and Founders Pennies (May 31<sup>st</sup>)
- Club Award Form (June 1<sup>st</sup>)
- Club Nominating Committee for your club's next year officers (January)
- What else?

**Mandy** - Members, what are some additional fees that your club, GWR, SIA or SI encourages or charges? Tell me things and amounts that your club has committed to...

- SIA convention delegate fee (January -even years \$350)
- GWR Spring Conference fee (July \$100)
- Club Giving (\$500)
- VRA – how much do you give?
- WOA – how much do you give?
- Ruby – how much do you give?
- Any other gifts, sponsorships, grants, etc that expends funds?
  - What amount is outgoing?
  - What amount is incoming?
  - What is the total amount of monies that you want in reserves? For instance GWR requires \$40,000 in reserves.
  - So, let's add these up - how much money do you need to earn this year?

**Mandy** – Members, what fun membership events does your club want to do, what month and how much will it cost?

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**Mandy** – Let's quickly count up the costs we've generated so far...So we will need to generate \$?? to break even this year.

**Mandy** - Members, what fun fundraising events does your club want to do and what month – to generate the necessary funds?

- Sip and Stroll - (January?, what is the net profit?)

- ????? (Month, cost, generated)
- ???? (Month, cost, generated)

**Mandy** – Members, let's look at this calendar and consider if we are really going to commit to all these fundraising, membership, and community service events! Do they all meet our mission? Will our members really commit this much time and energy? If not, let's take some off.

**Penny** - Does anyone know some serious or silly calendar events that may generate a good program, or introduction, or Soroptimist education opportunity?

- Valentine's Day – February
- Religious Holidays - ???
- Independence Day – July
- Day of Peace – September
- Left handed Day – August
- United Nations Day – October
- AIDS Day – December
- Friendship Day – August
- Teacher Day – May
- Earth Day – April
- Nut Day – October
- Heart Health - February
- Cancer - October

**Penny** - Some great topics for a presenter or a Soroptimist education moment can be found in the SIA Be It Resolved, SIA White Papers, or the SI Where We Stand, you will see information about: (overhead)

### **SLIDE 11 – SIA papers**

- Health (SIA Be It Resolved)
- Voting (SIA Be It Resolved)
- Holding Public Office(SIA Be It Resolved)
- Gender Based Violence (SI Where We Stand)
- Human Trafficking (SI Where We Stand)
- Peace Building (SI Where We Stand)
- Safe Motherhood (SI Where We Stand)
- Rights of the Girl Child (SI Where We Stand)
- Water & Sanitation (SI Where We Stand)
- Leaders & Decision Making (SI Where We Stand)
- Refugees (SI Where We Stand)
- Women & Cardiovascular Disease (SIA White Paper)
- The New Face of Slavery (SIA White Paper)
- Workolace Campaion to End Domestic Violence (SIA White Paper)

- STOP Trafficking (SIA White Paper)
- Balancing Work & Family Life (SIA White Paper)

Where on the calendar do you see any of these topics fitting for either an internal Soroptimist education moment (have someone research and report) or asking for a guest speaker?

- Gender Based Violence – November (coincide with Soroptimist Workplace Campaign to End Domestic Violence)
- Health or Women & Cardiovascular Disease – February (Heart Health Month)
- Peace Building - September (Day of Peace)
- Refugees – July (Independence Day)
- Election Day – November (Voting, Holding Public Office)
- Friendship Day – August (Grant of Friendship)

**Mandy** – Let's mark these items with who is responsible. Once you have plotted your calendar, let's highlight some of the areas to assign the task. Every club has different officers and committees so let's just identify some general responsibilities and you check your bylaws and procedures to see who actually is responsible.

- What are the tasks that your treasurer should handle?
  - July: Dues, Spring Conference fee \$100
  - January: SIA Convention Delegate Fee (even years \$350)
  - May: Club Giving, Founders Pennies \$.06 per year
- Tasks for your secretary?
  - July, September, May: Registration for LTR, Fall Meeting, Spring Conference
- Tasks for your Vice President?
  - Elections
  - Promotes region events or Soroptimist Education
- Tasks for your program chair?
  - July: 4<sup>th</sup> Independence Day, Refugees (SI Where We Stand)
  - September: 21<sup>st</sup> Day of Peace, Peace Building (SI Where We Stand)
  - November: 25<sup>th</sup> International Day for Elimination of Violence Against Women, Workplace Campaign to End Domestic Violence, Gender Based Violence (Where We Stand)
  - December, January, February, March: Awards deadlines and ceremony
- Tasks for your fundraising chair?
  - We need \$???? funds this year
- Tasks for your membership chair?, Tasks for your public awareness chair? Tasks for your special committees?
  - You see the pattern...

**Mandy** – Members, looking at the calendar, what items should be on your board meeting agenda and when?



- Budget approval in June/July
- Nominating Committee in January/February
- Talking about region events: LTR, Fall Meeting, Spring Conference
- Changes to documents
- Other decisions needed?

**Mandy** – Members, looking at the calendar, what items should be on your business meeting agenda and how far in advance?

- Notice of registrations
- Notice of upcoming events
- Approval of changes to bylaws

**Mandy** - Any other input?

**Penny** - Ok, you have a basic guide to help manage your year as a leader. Is it as overwhelming as you thought? Once you plot the MUSTS and the WANTS – it isn't - is it?

**SLIDE 12 – Quote:** *If your actions inspire others to dream more, learn more, do more, and become more, you are a leader. John Quincy Adams*

Remember, you are not alone, you have your entire membership who elected you and wants you to succeed. You have your past leadership, you have other clubs in your local area, you have your District Director, you have the entire GWR leadership, you have past Governors, and you have SIA. Please ask questions today – and enjoy being a leader!