

LTR President's Workshop 2017 PPT Script

PURPOSE -

01/ Thank you everyone for taking the time out of your busy schedules to join us here in Ontario for some crucial training as leaders of your clubs...and hopefully you will gain some piece of mind and a little bit of fun and fellowship.

02/ 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, this is the place to ask and we will be doing our best to answer. We also have a few handouts to take with you at the end of this to hopefully help you with your endeavors.

03 / So let's talk about "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... in order to be of "ONE mission".

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

- to pursue the vision that women and girls have the resources to reach their full potential and live their dreams
- to improve the lives of women and girls through programs leading to educational, social and economic empowerment;
- to serve as a voice on issues of importance to women and girls; AND
- to engage in any other lawful activities that further the exempt purpose of the club.

Without purpose, our organization is floundering in too many different directions to be effective or even understood. Again... ONE mission.

04/ AND, as administrators of this incredible region...we (the board and committees) 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 assist and motivate clubs in their efforts toward “service” to women and girls;

- to be an administrative support system of Soroptimist clubs; AND

- to encourage those clubs in building a solid base of continuous and expanding membership.

05/ And then there is our BIG GOAL. This represents our road to success...of maintaining our ONE mission in order to reach our BIG Goal.

**Does anyone remember what that goal was? “ to invest in the dreams of ONE MILLION women and girls through access to education by 2031”
Do you feel this is an achievable goal for our federation?**

This is a goal that your governor and her board have truly taken to heart...hence the “Access to Education” Summit at the last Spring Conference. It has even inspired some clubs to look into planning educational summits and discussions in their own communities. And, most importantly, it strengthens our Soroptimist of the Americas brand. This is what will get us known and create the greatest impact for improving lives - our Dream Programs.

It is our responsibility to keep our clubs moving toward more participation in the “Live your Dream education and training awards for Women” (of which we have continually participated 100%! BTW) AND our “Dream It, Be It: Career Support for Girls”. If you have any questions or challenges with this, your GWR Board is here to help you.

So how do we get from “ONE mission” to this worthy but daunting goal? Well, we keep going with...and expanding on...the life changing programs that we have on our Soroptimist “road to success”:

**“Live YOUR Dream” awards
“Dream It, Be It” program
LiveYourDream.org website**

We also support our “ONE Mission” by funding the SIA “Club Giving” Program; by supporting our own organization’s efforts - with 10% of our fundraising proceeds. So again...as presidents moving your clubs toward Dream Programs and Club Giving; this is how you meet your responsibility to be a club that is not a stand alone entity, but part of a powerful and impactful - INTERNATIONAL – organization!

Any questions or suggestions on how to stay on this “ONE mission” course and achieve the BIG GOAL by 2031?

06/ And how do we measure our success rate at achieving these goals as a region?

By updating our “GWR Shining Club” reports, of course. This report was created to help us all measure if our club is doing what we should be doing. It literally contains all the information SIA asks our Governor to report annually and your work gives our region “Outstanding Region” status – the highest level SIA created. Thank you for that!

Make sure you get these reports to your DD by September 1st. Fillable copies are also available on the GWR website.

JOB DESCRIPTIONS – PRESIDENTS

07/ Club President’s...bless your hearts. Where would we all be without you.

Your region wants to do everything in it's power to make your job as stress-free and rewarding as possible. So lets 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 your club's work, ideas and visions... not to dictate.

I'm sure the minute you were on the job, you began getting organized. But here are some other things to keep in mind:

- **You do need to give yourself the time to do that before you begin the business of presiding over your clubs.**
- **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/

- **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 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 meeting 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 member has 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.

09/ 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 the board of directors, but the work is to be performed by officers, board members, standing and special committees, and 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 overworked 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. Always include a “new business” section so some creativity and new ideas can happen throughout the year.

10/ 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.

- **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 (although, 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/ There are also Administrative Responsibilities Relating 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. And...

- **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, Mandy Mann, has about a minute and a half after elections to gather all the information on 48 newly elected club leaders, put it in a professional looking document and distribute it to all the clubs.

Please give Secretary Mandy 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/ 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 read it!

Nobody wants to be THAT president! Knowledge is Power – So, Be a Powerful, Informed President!

JOB DESCRIPTION –

13/ 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.

(Maybe introduce them if it seems appropriate)

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! Walk up and introduce yourself if you don't haven't already. Tell us what you are up to and what your hopes are for this year.

14/ 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 your district once during the biennium.**
- **Keep in mind that the region pays the District Director's Travel expenses for this visit. If your club would like another visit, or would like her to come back and serve as the installing officer, it is the club's responsibility to pay for travel costs.**
- **District Directors are also responsible for Coordinating a fall meeting for all district clubs each year of the biennium.**

Sometimes District Directors will just check in with you via email or schedule a roundtable discussion via conference calls.

The number 1 communication tool for the region is EMAIL. You need to check you club's email often. Like, every day or 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 is Key! It is a very close relative of "Delegating". And as I said before, a breakdown in communication just makes more work for everybody.

15/ DD Responsibilities for District Fall Meetings

The district director is responsible for developing the fall meeting budget, the program, and creating and sending the call to the meeting.

District directors work closely with their fall meeting hostess club or clubs in planning for the meeting, including selecting a facility and menu for the meeting, deciding on a meeting theme, coordinating registration, facilities set up, and planning the entertainment/social aspects of the meeting.

If you haven't hosted recently, things have changed! The district director now handles all the funds and the program. Hosting clubs handle the hospitality and creativity, plus helps with making the event

run smoothly. If you haven't hosted in a while, please consider hosting next year's district Fall Meeting.

It's a big job – and your district director does it all FOR YOU!

16/ And, speaking of fall meetings, did you know that the fall meeting is designed to provide clubs with the most current information... to assure that we are working in a coordinated manner to carryout the Soroptimist mission?

AND, fall meetings are an excellent opportunity for new members to learn more about how the organization operates. In a perfect world, every member of every club would attend every Fall Meeting.

Here are 5 really great reasons your club members should attend your 2017 Fall Meeting:

- 1. Bond with your club members,**
- 2. Receive the latest information on how to effectively implement important Soroptimist programs**
- 3. Gain a better understanding of ways your club can carryout the Soroptimist mission**
- 4. Inspire and be inspired by connecting with other Soroptimist members – and sharing or “borrowing” ideas!**
- 5. Increase your Soroptimist IQ**

17/ Fall Meetings are so important to a club's involvement. It is so hard for you, as presidents, to guide members who don't have a clue as to what is going on in our organization.

It's such a short weekend and SOOOO doable. Get them to put it on their calendar NOW and impress upon them the importance of going. PLEASE encourage as many members of your club to come as possible. Your club will be energized and go home with lots of good Soroptimist fellowship and ideas.

“SAVE THE DATE” flyers for you to share with your clubs should come out shortly if they haven’t already.

And don’t forget Spring Conference and the Soroptimist Summit “Access to Education” June 7th – 9th. Last Year’s Spring Conference was so inspiring and energizing. And next year’s Conference promises to be even better! Plus...we have the added benefit of holding it at the Pala Resort and Casino in Temecula, CA...where they have wineries, nightlife, great food and hot air balloon rides. We are so excited about this and hope your will take this excitement back to your clubs!

CLUB ADMINISTRATION

18/ We’d now like to go over some of the crucial deadlines for these Programs in Soroptimist, that defines who we are as an organization. First and foremost being:

The “Soroptimist Live Your Dream: Education and Training for Women Award”. The deadline suggested for application be turned into clubs is November 15th and the deadline for submission to the Region to send on to SIA is February 1st.

To find out more, there is a Frequently Asked Questions section on the SIA website. All of the applications and transmittal information is in the Live Your Dream Awards Club Participation Toolkit, and are also on the SIA website.

You will need to start getting out your applications right away...I would say...as soon as you get back home.

The Dream It, Be It program has been a great success for many clubs in our region. It has huge impact opportunities for young women entering the job force, training and/or higher education. This program tool kit is available on the SIA website.

And finally, The region “Soroptimist Celebrating Success” awards. Clubs submit their forms to the Soroptimist Celebrating Success Cordinator -

Liz Glowka – lizg.gr@gmail.com . Winners are selected at the region level and forwarded on to SIA for their club awards.

Right now you have the opportunity to brag on your clubs 2016-2017 club year. The deadline for submission is September 30th. As part of the brainstorming sessions for you club, you have an opportunity to tell us what wonderful things you are doing in Membership, Fundraising, Program and Public Awareness. Liz has posted all of the criteria on the GWR website.

19/ Now lets take a look at some of the resources available to you from your region:

These three publications are the “How, When, and Who” in the world of a club President. I would highly recommend that you print out these 3 publications, put them in a notebook and carry them with you to meetings. They are all available for download from the GWR Website Members Resources Document Library. The only one that is password protected is the Leadership Directory. Do you remember the password?

The Club Management Guide is the publication we referred to earlier. It is the nuts and bolts of running your clubs 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**
- And last, but not least, at the back of the guide you will find a handy script for inducting new members and installing club officers.**

Another very, 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 a great resource to print out for other club members as well and is available for download from the GWR Website Members Resources Document Library.

And, once you download load it – USE IT!! It is literally a calendar of what to do each month. If you follow this checklist, you will be doing the basics of what the region and federation asks you to do. It's as easy as that.

And finally, the password protected Leadership Directory lists all of our region Officers, Directors, Committee Coordinators and Members, and upcoming Fall Meetings, Spring Conferences, SIA and SI Conventions ...just to name a few. Don't know who to submit your Live Your Dream recipient to? You will find that information in the leadership directory.

20/ We also recommend that you make up you own club calendar using the President's checklist for deadlines and your own club's activities.

We have some blank ones available on the GWR website.

21/ CLUB BYLAWS, always such a 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 two resources to help you address both of these areas:

- 1. SIA has a sample Club Bylaws template on their website; download and compare this template with your current club bylaws. You should have a committee or assign 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 and Resolutions committee. The point is, that if you haven't updated you bylaws in over 2 years, it's time to do it now.

- 2. The GWR Laws and Resolutions Committee exists to assist clubs with reviewing their bylaws and recommending appropriate changes. The region is requesting that all club send their bylaws into this committee to have them reviewed. A couple of issues have cropped up where provisions for an event were not addressed in the bylaws, which created problems. If it's been a few years, time to do this. Plus, our organization is constantly changing to meet the needs of our members and the world we serve.**

So, Take advantage of these valuable resources!

22/ We recommend that you, as an incoming club president, review your club financial policies to make sure the following requirements and procedures are in place:

- 1. Club approval of an annual budget**
- 2. Procedures to keep cash and checks safe**
- 3. Presentation of regular financial reports – we recommend monthly reports.**
- 4. Timely reconciliation of the bank statement**

Does your club have requirements like these? Do you know where to find them?

23/ Here are a few more best-practice financial policies:

- 5. Bank reconciliation reports should be reviewed and approved by the club president**

- 6. Segregation of duties: Example: Member receiving cash/making bank deposits should not be responsible for bookkeeping or reconciling the club bank statement?**
- 7. A voucher system should be in place to assure all club expenditures are authorized and documented. At the region, three people (governor, governor-elect, and treasurer) must approve a voucher before a check is cut.**

Does your club use a voucher system?

24/ AND, even more best practice financial policies:

- 8. Internal control procedures to help prevent fraud: Two or three signers on your bank account**
- 9. Guidelines for reimbursement of expenses incurred by members conducting business on behalf of the organization – liking getting permission from the club before making an expenditure for which you want to be reimbursed**
- 10. Requirement for annual audit/review of financial records and reporting of the results to club. The SIA website has templates for audits/reviews.**

25/ One of the best resources for presidents related to financial accountability is actually the GWR Treasurer's Manual.

We recommend that you download this document from the GWR Website and give copies to your Board. Then review it to make sure that your club is following proper procedures.

SIA also has a good summary document entitled 501(c)(3) Organizations: Fundraising, the IRS and State Law. This document is available on the SIA website in the Membership Section under Club Administration.

COMMUNICATION -

26/ Communication... (need a minute?)

27/ The Golden West Region will continue communicating with all clubs through your @soroptimist.net email account.

We still want to encourage clubs to access and use these emails accounts. I know that there is still a few clubs out there who do not use it and it makes it very difficult to communicate with you. If you are one of those clubs, PLEASE call SIA personally and have them help you RE-set up your account and password. There are a number of benefits to using your @soroptimist.net email as your permanent club email:

- Eliminates need to change club email contact every year**
- Legitimizes your club status - An email address @soroptimist.net tells those that receive your communications 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.**

28/ Any other questions or concerns before we break out into our perspective Districts?

Thanks again for being here and stepping up to take this position as a leader in our organization. We look forward to working with all you wonderful leaders in the upcoming year.