

SOROPTIMIST

Golden West Region

ONE *mission*

2017 – Leadership Training – 2017

PRESIDENT'S WORKSHOP

Soroptimist Golden West Region
www.goldenwestregion.org
www.soroptimist.org

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SOROPTIMIST

Best for Women

PRESIDENT'S WORKSHOP OVERVIEW

You are not adrift!

OUR
PURPOSE

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ONE MISSION
BIG GOAL
SHINING CLUBS

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DISTRICT
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SESSIONS



OVERVIEW

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 social and economic empowerment;



The purpose of our CLUBS!



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.

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



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



The purpose of our REGION!



to be an administrative support system of Soroptimist clubs;
AND



to assist and motivate clubs in their efforts toward "service" to women and girls;

ONE *mission* The BIG Goal



Road Trip!

GWR Shining Club

Date: _____ District: _____ Club: SI _____ President: _____

The Golden West Region board has been asked by SIA to track and measure areas important for organizational success. These areas include supporting our strategic direction, focusing on our mission, and increasing our collective impact through membership, programs, public awareness, fundraising, leadership, finances and communication. **Please complete this form reflecting your club's actions from July 1, 2015 through June 30, 2016 (last Soroptimist year) and send to your District Director as soon as possible but before November 1, 2016.** This Soroptimist year (July 2016-June 2017) will also be discussed during your official visit with your District Director. As our thank you for your commitment to success, your club will be recognized at the 2017 Spring Conference!

Supporting Leadership	Yes	No	Comments
*Our club has a president and president-elect who will become president. (Leadership succession)			
Our club has a full slate for elected offices and is able to fill appointed positions including program, fundraising, membership and public awareness chairs.			
Our President or president-elect attends Leadership Training Retreat.			
Our President or president-elect attends Fall Meeting.			
Our President or president-elect attends Spring Conference.			
Our President or president-elect attends SIA Convention or SI Convention.			
Our club pays for member(s) to attend region or federation events. How?			
Our president participates in district/region conference calls.			
Our club develops member leadership skills. (public speaking, planning, team- building). How?			
Our club has a strategic plan that supports the GWR and SIA plans.			
Supporting Finances			
*Our club is financially solvent. Our club anticipates status considering membership, finances.			
Our club has a budget and an annual audit.			
Our club participates in Club Giving. How?			
Our club participates in Founders Pennies. How?			
Our club members participate in Laurel Programs. How?			
Our club members support GWR Dream Makers. How?			
Our club members participated in the Dream Jars challenge to collect funds for Dream Makers.			
Our club donates basket/funds toward Spring Conference fundraising events. How?			
Supporting Program/Mission			
(Impact and Philanthropy sections of the SIA strategic plan)			
Our club participates in Live Your Dream Awards for Women. We recognize _____ women with \$ _____			

GWR Shining Club /Healthy Club Reports

Due to your District
Director no later
than September 1st

Our club participates in Dream It, Be It: Career Support for Girls.			
Our club members have joined liveyourdream.org.			
Our club/members participate in region and federation online surveys.			
Supporting Public Awareness			
Our club uses Soroptimist online tools for success.			
Our club has current website. Name: _____ Our club uses Club Express.			
Our club has current Facebook presence. Name: _____			
Our club uses other social media platforms. List.			
Our club participates in Program Focus Reports. How many submitted? #			
Our club participates in Soroptimist Celebrating Success. How many submitted?			
Supporting Membership			
(Engagement and Recognition sections of the SIA & GWR strategic plan)			
Our club had _____ members last year. We have _____ members this year. _____ are the same members.			
Our club had a recruitment event. Attendees _____ Joined _____			
Our club invited _____ prospective members to meetings/events. #attendees _____ #joined _____			
Our club has used GWR recruitment funds.			
Our club has a strategic plan to increase membership and a plan to retain members.			
Our club had _____ members attend Leadership Training Retreat.			
Our club had _____ members attend Fall Meeting.			
Our club had _____ members attend Spring Conference.			
Our club pays for members to attend region or federation events. How?			
Our club uses our SIA club email.			
Our club has members update their email addresses on the SIA website system.			
Our club receives SIA Introduction forms for potential members. #received _____ #joined _____			
Our club expresses interest in chartering new clubs in our local community.			
Club Strengths and Successes.			
Club Challenges.			
Club Input for Improving the Soroptimist Experience.			

CLUB PRESIDENT JOB DESCRIPTION

Club President

LEADERSHIP RESPONSIBILITIES

- ✧ Assume leadership of the Club.

Always remember that you are there to guide your club. It is your job to facilitate, not to dictate.

- ✧ Give the time and effort necessary to lead and carry on the work of the club.
- ✧ Begin and end meetings on time.
- ✧ Acquire a strong working knowledge of our Mission.
- ✧ Serve as delegate and represent your club at conferences.



JOB DESCRIPTIONS

CLUB PRESIDENT JOB DESCRIPTION

Club President

LEADERSHIP RESPONSIBILITIES

- ✧ Represent your club and this organization in your community.
- ✧ Demonstrate strong leadership skills, but also strive to *develop leadership in others*. SHARE responsibility.
- ✧ Look for other members who demonstrate leadership potential and make a point to teach them by delegating specific responsibilities. TELL them that you see potential in them.
- ✧ Let them do it! You will be better off and so will your club!



JOB DESCRIPTIONS

CLUB PRESIDENT JOB DESCRIPTION

Club President – Relating to Club and Board

ADMINISTRATIVE RESPONSIBILITIES

- ✧ 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 of course members.
- ✧ **ALWAYS** plan and prepare agendas for club and board meetings, including all matters of business and promotion of SIA, region and club activities, encourage membership participation and conduct meetings efficiently and effectively.



JOB DESCRIPTIONS

CLUB PRESIDENT JOB DESCRIPTION

Club President – Relating to Club Committees

ADMINISTRATIVE RESPONSIBILITIES

- ✧ Meet with club committee chairs and coordinators to provide assistance and motivation for implementation of programs and to stimulate ideas throughout the year.
- ✧ Appoint all club standing and special committees, unless otherwise directed in the club bylaws.
- ✧ Share views with club committee chairs, but let the chairs preside at committee meetings.



JOB DESCRIPTIONS

CLUB PRESIDENT JOB DESCRIPTION

Club President Relating to Region and SIA

ADMINISTRATIVE RESPONSIBILITIES

- ✧ 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 ALL club members.
- ✧ Immediately after the club election, ensure that SIA and Region forms are returned with correct data regarding new officers and required committee members for the annual directories and mailing lists.



JOB DESCRIPTIONS

CLUB PRESIDENT JOB DESCRIPTION

Knowledge is Power!

Be as knowledgeable and informed as you can possibly be and you will be a Powerful President!

...**Whoo Hoo!**



JOB DESCRIPTIONS

Meet Your **GWR District Directors**



District 1 Director

Rene Meyers
SI Baldy View



District 2 Director

Kimberly Cook
SI Desert Cities of the
Coachella Valley



District 3 Director

Laurie Scott Moses
SI Parker



District 4 Director

Paula Adkins
SI Phoenix, Inc.



"WELL, HELLO THERE!"

DISTRICT DIRECTOR JOB DESCRIPTION

PRIMARY RESPONSIBILITIES

To connect and communicate with clubs by:

- ✧ Disseminating and updating pertinent information from the region and SIA directly to Club President.
- ✧ Making an official visit to your club during the biennium.
- ✧ Coordinating a FALL MEETING for all clubs in her district.
- ✧ Facilitating club President and members in finding resolutions to challenges or issues.

No. 1 communication tool : EMAIL



JOB DESCRIPTIONS

DISTRICT DIRECTOR JOB DESCRIPTION

FALL MEETINGS:

- ✧ Works closely with Hostess club(s) to select facility and menus.
- ✧ Develops a Meeting Budget to be approved by Governor.
- ✧ Prepares and send “CALL” to Fall Meeting.
- ✧ Develops the Fall Meeting Program; coordinating with Region officers, committee coordinators and presenters.
- ✧ Presents a financial report to Region within 60 days of Fall Meeting.



JOB DESCRIPTIONS

FALL MEETINGS

5 reasons to attend...

Bond with your club members and create excitement for the upcoming year.

Inspire and be inspired by connecting with other Soroptimist members.

Increase your Soroptimist IQ and boost confidence to lead your club.

Learn how to guide your club to carry-out the Soroptimist Mission.

Learn how to effectively implement important Soroptimist Programs.



REGION MEETINGS

OTHER IMPORTANT INFORMATION

2017 FALL MEETINGS

District 1 ~ October 6th & 7th

District 2 ~ October 20st & 21st

District 3 ~ October 13th & 14th

District 4 ~ October 27th & 28th

2018 SPRING CONFERENCE

June 7th – 9th, 2018 in Temecula, CA



REGION MEETINGS

SOROPTIMIST PROGRAMS

Live Your Dream: Education and Training Awards for Women

Deadline – November 15th, 2017 (applications to clubs)

Deadline – February 1st, 2018 (transmittal & applications to region)

Dream It, Be it: Program for Girls

Report your Progress by February 15th, 2018

Soroptimist Celebrating Success: Your chance to be acknowledged for the wonderful things your club does in each Pillar area.

Deadline – September 30th, 2017 (to **Liz Glowka: lizg.gwr@gmail.com**)



CLUB ADMINISTRATION

CRUCIAL LEADERSHIP RESOURCES

Golden West Region



CLUB MANAGEMENT GUIDE

July 2012



Soroptimist International of the America's, Inc.

Golden West Region

2017-2018

Club Officer's Activity Checklist



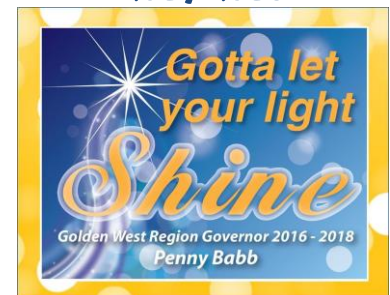
SOROPTIMIST
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Soroptimist International of the America's, Inc.

Golden West Region

Leadership Directory

2017-2018



Available in the "Members
Resources Document Library" on
the GWR website.

SOROPTIMIST

Golden West Region



2017 - Leadership Training - 2017

PRESIDENT'S PLANNING CALENDAR

<p><u>JULY 2017</u></p> <p>Club Budget Approval - Audit GWR & SIA Dues/Form 200</p> <p>Registration LTR</p> <p>4th Independence Day *Refugees (SI Where We Stand)</p> <p>Pay Spring Conference Fee \$100</p>	<p><u>AUGUST 2017</u></p> <p>Aug 4, Leadership Training Retreat</p> <p>Aug 4th Friendship Day *Grant of Friendship (SIA/GWR)</p> <p>Club Planning Retreat</p> <p>Plan Recruitment Event</p>	<p><u>SEPTEMBER 2017</u></p> <p>Registration Fall Meeting</p> <p>Soroptimist Celebrating Success Deadline – Sep 30th</p> <p>Sep 21st Day of Peace *Peace Building (Where We Stand)</p> <p>LYDA applications to public</p> <p>Submit “Shining Club” Rpt to DD</p>	<p><u>OCTOBER 2017</u></p> <p>Fall Meetings</p> <p>Oct 3rd Founders Day *History of Founders Day</p> <p>Oct 24th United Nations Day *SIA - United Nations SRO</p> <p>Breast Cancer Month *Health (Where We Stand)</p>
<p><u>NOVEMBER 2017</u></p> <p>990 Form due to IRS</p> <p>LYDA applications to club – 15th</p> <p>Nov 25th Intl Domestic Violence *SIA Workplace Campaign to End Domestic Violence *Gender Based Violence (Where We Stand)</p> <p>Plan “Dream It Be It” Event</p>	<p><u>DECEMBER 2017</u></p> <p>Dec 10th Human Rights Day *Rights of the Girl Child (Where We Stand)</p> <p>Dec 10th SI President's Appeal - Educate to Lead: Nepal</p>	<p><u>JANUARY 2018</u></p> <p>Nom Committee for club officers SIA Celebrating Success Award</p> <p>Jan 11th Human Trafficking *SIA STOP Trafficking</p> <p>SIA Convention fee - \$0 (Paid every other year)</p>	<p><u>FEBRUARY 2018</u></p> <p>LYDA to region – Deadline Feb 1st</p> <p>Hearth Health Month *Women & Cardiovascular Disease (White Paper)</p> <p>Prepare SIA Club Grant for Women and Girls</p>
<p><u>MARCH 2018</u></p> <p>Saturday of Service Submit Officer Nominations</p> <p>Mar 8th Intl Women's Day *Live Your Dream” Awards</p> <p>Club Grant Deadline – March 15th</p>	<p><u>APRIL 2018</u></p> <p>Program Focus Rpts Deadline – 15th Award Ceremony</p> <p>Elect new club officers</p> <p>7th World Health Day *Health (Be It Resolved)</p> <p>VRA amount: \$ WOA amount: \$ Ruby amount: \$</p>	<p><u>MAY 2018</u></p> <p>Registration Spring Conference May 31, Club Giving Deadline May 31, Founders Pennies Deadline</p> <p>Report New Club Officers</p> <p>Club Giving – 10% Founders Pennies – \$ *SIA years x \$.06 x #of members</p>	<p><u>JUNE 2018</u></p> <p>Spring Conference Club Award Form Deadline Installation of new club officers</p>

CLUB BYLAWS

When was the last time they were updated?

Recommended Best Practices

Review bylaws once during each Biennium, amend as needed to reflect organizational/club growth and development.

Resources

- ✧ SIA sample format for Club Bylaws on SIA website
- ✧ GWR Laws and Resolution Committee:

Mary Grier (SI Phoenix) – mgrier1@cox.net



CLUB ADMINISTRATION

FINANCIAL ACCOUNTABILITY

Procedures

Best Practice Club Financial Policies:

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



CLUB ADMINISTRATION

FINANCIAL ACCOUNTABILITY

Procedures

More Best Practice Club Financial Policies:

5. Club president reviews and approves bank reconciliation reports.
6. Segregation of duties.
7. A voucher system should be in place to assure all club expenditures are authorized and documented.



CLUB ADMINISTRATION

FINANCIAL ACCOUNTABILITY

Procedures

Even **MORE** Best Practice Club Financial Policies:

8. Internal control procedures: Two signers on your bank account.
9. Guidelines for reimbursement of expenses
10. Requirement for annual audit/review of financial records.



CLUB ADMINISTRATION

FINANCIAL RESOURCES

GWR Treasurer's Manual

- ◆ GWR Website
- ◆ in Member Resources
- ◆ under Region Documents

Soroptimist International
of the Americas –

**“501(c)(3) Organizations:
Fundraising, the IRS
and State Law”**

- ◆ SIA Website
- ◆ in Membership Section
- ◆ under Club Administration



CLUB ADMINISTRATION

COMMUNICATION



COMMUNICATIONS

GWR will continue to communicate with clubs using @soroptimist.net email addresses

President or designated club member should check club email at least once a day and respond within 24 hours, even if just to communicate “I GOT IT”.

GWR News Blasts

Timely attention is required – to share with your club members and to know if action(s) are required.



CLUB COMMUNICATIONS



WE THANK YOU FOR YOUR PARTICIPATION.

Soroptimist Golden West Region
www.goldenwestregion.org
www.soroptimist.org



S O R O P T I M I S T

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