



Keeping the Balance

A Guide for Clubs



SOROPTIMIST®
Investing in Dreams

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It takes a lot to build and maintain a successful club. You need passionate, energetic women. You need viable programs. You need to maintain a high profile in the community. And, of course, you need to have a realistic budget to sustain growth and manage fundraising. A successful Soroptimist club is a balance of all of these components, enabling business and professional women in local communities to help women and girls across the world every day.

Finding balance is difficult, especially when you aren't sure where to look for it. How do you break down components of your club to assess what is working and what is not? Often, we find that clubs slip into low membership without realizing the reasons behind the decline. To combat this, SIA leadership and staff have developed an early warning system highlighting common indicators of clubs at risk for low membership. While no single indicator means the club is going to fail, an analysis of clubs in the federation reveals that at least two or more of the following indicators were present prior to clubs slipping into low membership.

Please use this document as a tool to aid in the assessment of your club's health, and as a catalyst for intervention. The chart below offers sample club scenarios and the opportunity to indicate whether the scenario is true or false for your club. Sample actions that may be taken to correct each scenario are offered, as well as resources that are available to help you along the way.

Club Scenario	True	False	If you answered <i>True</i> , try this...	Resources Available to Clubs...
<i>Our current club president has served more than 2 years as president or has been president or an officer of the club in prior years.</i>			<ul style="list-style-type: none"> • Schedule a meeting for club leaders to discuss the role of the president, officers and committees. • Write clear job descriptions for all leadership positions and consider sharing responsibilities so that one person does not shoulder too much responsibility. • Develop a strategy to attract new members to leadership roles. Establish a mentoring program within your club to assist in succession. 	<i>Region membership chair</i> <ul style="list-style-type: none"> • Contact your region membership chair for assistance in talking to your club about the need for change. <i>SIA website</i> <ul style="list-style-type: none"> • Post a query in the member forum to gain insight from other clubs on how to create a culture of change. <i>SIA headquarters</i> <ul style="list-style-type: none"> • Contact the membership department for a one-on-one consultation.
<i>Our club has not attended or sent a delegate to our region conference for the second year in a row, or has sent the same delegate 3 years in a row.</i>			<ul style="list-style-type: none"> • Ask your region membership chair to attend your next business meeting to discuss the importance of participating in region events. • Send a new member to the conference as a way to engage her beyond the club experience. • Offer to participate in region conference planning meetings to help your club become more active in region activities. 	<i>Region membership chair</i> <ul style="list-style-type: none"> • Contact your region membership chair for talking points on why region interaction is important to the health of your club. <i>Region leadership</i> <ul style="list-style-type: none"> • Contact your region conference planning committee for additional information about the conference and how your club can get involved. <i>SIA headquarters</i> <ul style="list-style-type: none"> • Contact the membership department for additional information and ideas for engaging members in region activities.
<i>Our club has delinquent financial obligations to the region or federation.</i>			<ul style="list-style-type: none"> • Discuss your concerns with your club treasurer and ask for a copy of your current budget. • Contact your region treasurer and/or the SIA finance department to understand the status of your charter and resolve the issue. • Schedule a meeting with your club's officers to determine reasons for non-payment. Is your treasurer performing her duties in a timely manner? Is the club experiencing financial difficulties? Are your club dues 	<i>Region leadership</i> <ul style="list-style-type: none"> • Contact your region treasurer for sample budgets and dues formulas. <i>SIA headquarters</i> <ul style="list-style-type: none"> • Contact the finance department to develop a payment plan to bring your club into good standing.

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			<p>adequate to cover obligations to SI, the federation and the region?</p> <ul style="list-style-type: none"> Review club dues, fundraising projects and expenditures for the past 2 years. Make budgetary changes as needed. 	
<p><i>Our club treasurer has served in the same office for more than 2 consecutive years.</i></p>			<ul style="list-style-type: none"> Talk to your club officers. A leadership succession plan must be put into place as soon as possible. Work together to develop new leaders in your club. Establish a mentoring program for new members to assist in succession. 	<p><i>Region membership chair</i></p> <ul style="list-style-type: none"> Contact your region membership chair for assistance in talking to your club about the need for change. <p><i>SIA website</i></p> <ul style="list-style-type: none"> Post a query on the member forum to gain insight and information from other clubs on how to create a culture of change. <p><i>SIA headquarters</i></p> <ul style="list-style-type: none"> Contact the membership department for a one-on-one consultation.
<p><i>Our club members have formed subgroups or cliques and do not interact well together as a whole.</i></p>			<ul style="list-style-type: none"> At your next meeting, make it a point to address team-building and diversity within the club. Evaluate your committees. Are they diverse? Consider reorganizing teams to revitalize your club or inviting a consultant to assist with team-building exercises. 	<p><i>SIA headquarters</i></p> <ul style="list-style-type: none"> Contact the membership department for information on leadership, team-building and diversity in your club.
<p><i>Other than Founders Pennies, our club has not participated in any SIA or Soroptimist International development/fundraising projects for one year or more.</i></p>			<ul style="list-style-type: none"> Discuss your current operating budget with your club treasurer. Do you include the Annual Club Campaign? Evaluate your current fundraising events. Do you host many small events throughout the year or host one large event? What works best in your community? 	<p><i>Region fundraising chair</i></p> <ul style="list-style-type: none"> Contact your region fundraising chair for additional ideas for fundraising in your community. <p><i>SIA website</i></p> <ul style="list-style-type: none"> Review the fundraising resources and information in the members area.
<p><i>Retired/unemployed and life members constitute more than 50% of our club's total membership.</i></p>			<ul style="list-style-type: none"> Contact your region membership chair to receive copies of monthly membership reports from SIA. Develop and implement a membership recruitment plan using the principles of the SIA Renaissance Campaign as a guide. Review membership requirements to ensure they are welcoming to new members. 	<p><i>Region membership chair</i></p> <ul style="list-style-type: none"> Ask your region membership chair to mentor your club through the initial recruitment process. <p><i>SIA website</i></p> <ul style="list-style-type: none"> Visit the membership resource and information section for valuable materials to assist in the recruitment process. Visit the federation information section for additional information on the Renaissance Campaign.
<p><i>Our club has not realized an increase in members for one entire year or has realized a net decrease in membership for 2 consecutive years.</i></p>			<ul style="list-style-type: none"> Contact your region membership chair to receive copies of monthly membership reports from SIA. Evaluate the culture of your club. Are your meetings held at a convenient time and location? Do you have engaging guest speakers? Are new members given an appropriate introduction to the club? Most importantly, 	<p><i>Region membership chair</i></p> <ul style="list-style-type: none"> Contact your region membership chair for additional information on retention and recruitment efforts in your region. <p><i>SIA website</i></p> <ul style="list-style-type: none"> Visit the member forum to share experiences with

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			<p>does your club offer a welcoming atmosphere for new members?</p> <ul style="list-style-type: none"> • Develop a plan of action to attract new members. Contact your region membership chair to learn how you can use the Renaissance Campaign to revive recruitment efforts and improve retention in your club. • Host recruitment events throughout the year. Remember that meeting new prospects is only part of the recruitment process – following up with potential members and actively soliciting them for membership is an important component for success. 	<p>other clubs.</p> <ul style="list-style-type: none"> • Visit the membership resource and information section to download tools and templates.
<p><i>Our club has been on the SIA low membership list during the past year.</i></p>			<ul style="list-style-type: none"> • Contact your region membership chair to receive copies of the SIA monthly membership reports. • Evaluate your recruitment efforts. Are you actively pursuing members? How many recruitment events have you hosted this year? Have your members personally followed up with each prospect? • Evaluate your retention efforts. Are your meetings held at a convenient time and location? Are your meetings interactive and engaging? How do you ensure that all members feel valued and committed? • Develop a recruitment and retention plan that maximizes the strengths of your club members. 	<p><i>Region membership chair</i></p> <ul style="list-style-type: none"> • Contact your region membership chair to discuss recruitment and retention options for your club. <p><i>SIA website</i></p> <ul style="list-style-type: none"> • Visit the member forum to gain insight and ideas from Soroptimist clubs around the world. • Visit the membership resource and information section to download tools and templates.
<p><i>Our club does not participate in women and girl focused projects.</i></p>			<ul style="list-style-type: none"> • Talk to your club’s officers and members – why doesn’t the club participate in projects that focus on women and girls? • Devote a portion of your next business meeting to a discussion about participating in women or girl focused projects. Can one of your current projects be transformed into a women and girl focused project? • Stress the tie between working toward SIA’s mission and successful recruitment and retention efforts. 	<p><i>SIA headquarters</i></p> <ul style="list-style-type: none"> • Contact the SIA program department for additional information on programs and how your club can participate in women and girl focused projects. <p><i>Region program council</i></p> <ul style="list-style-type: none"> • Contact your region program council member to discuss options for your club. <p><i>SIA website</i></p> <ul style="list-style-type: none"> • Visit the program resources and information section to download resources and materials.
<p><i>Our club does not participate in the Women’s Opportunity, Violet Richardson, or Making a Difference for Women Awards or the Soroptimist Workplace Campaign to End Domestic Violence.</i></p>			<ul style="list-style-type: none"> • Talk to your club’s officers and members – why doesn’t the club participate in any federation programs, particularly Soroptimist’s signature program the Women’s Opportunity Awards? • Devote a portion of your next business meeting to discussing options for participating in one of the federation programs. • Stress that participating in federation programs helps to build a strong Soroptimist brand, which aids in successful recruitment and retention efforts. 	<p><i>SIA headquarters</i></p> <ul style="list-style-type: none"> • Contact the SIA program department for additional information on programs and how your club can participate. <p><i>Region Program Council</i></p> <ul style="list-style-type: none"> • Contact your region program council member to discuss options for your club. <p><i>SIA website</i></p> <ul style="list-style-type: none"> • Visit the program resources and information section to download resources and materials.
<p><i>Despite efforts to publicize our</i></p>			<ul style="list-style-type: none"> • Discuss your current public relations efforts with your 	<p><i>Region public awareness chair</i></p>

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<i>club's activities, our community is not familiar with Soroptimist or its programs.</i>			<p>club. Does your club have a workable PR plan in place? If not, work together and with your region public awareness chair to develop and implement an annual PR plan and budget.</p> <ul style="list-style-type: none"> Identify a member as the club's spokesperson. This can be the club president or someone else who feels confident they can handle the task. This will help to establish credibility in the community and build relationships with media contacts. 	<ul style="list-style-type: none"> Contact your region public awareness chair for support and help with building media lists. <p><i>SIA website</i></p> <ul style="list-style-type: none"> Visit the public awareness section for templates, ideas and other sample publicity materials. Post a query in the member forum and/or share information about successful public awareness activities. <p><i>SIA headquarters</i></p> <ul style="list-style-type: none"> Use SIA's PR FaxBack service to help you write clear, concise press releases, media advisories and more. Contact the public relations manager for one-on-one assistance.
<i>Our club does not have time to publicize events and activities.</i>			<ul style="list-style-type: none"> Form a PR committee in your club and divide the public awareness duties among those serving on the committee, so that the PR responsibilities don't fall on just one member. Don't reinvent the wheel. Headquarters provides a number of sample publicity materials for various programs including the Women's Opportunity, Violet Richardson and Making a Difference for Women Awards. The materials include easy-to-customize templates for news releases, media advisories, PSAs and more. 	<p><i>Region public awareness chair</i></p> <ul style="list-style-type: none"> Contact your region public awareness chair for support. <p><i>SIA website</i></p> <ul style="list-style-type: none"> Visit the public awareness section for templates, ideas and other sample publicity materials. <p><i>SIA headquarters</i></p> <ul style="list-style-type: none"> Take advantage of SIA's PR FaxBack service to help you write clear, concise press releases, media advisories and more. Contact the public relations manager for one-on-one assistance.
<i>The news coverage our club receives is not women and girl focused.</i>			<ul style="list-style-type: none"> Evaluate the messages your club is sending to local media by taking a look at what your club is doing in the community. Are you publicizing programs that do not support the Soroptimist mission? Send clear messages about who we are and what we do to media by conducting and publicizing mission-focused projects. Use the sample publicity materials in the members area of the website to help you communicate clearly with the media and your community. 	<p><i>Region public awareness chair</i></p> <ul style="list-style-type: none"> Contact your region public awareness chair for support. <p><i>SIA website</i></p> <ul style="list-style-type: none"> Visit the public awareness section for templates, ideas and other sample publicity materials. <p><i>SIA headquarters</i></p> <ul style="list-style-type: none"> Take advantage of SIA's PR FaxBack service to help you write clear, concise press releases, media advisories and more. Contact the public relations manager for help preparing for interviews with the media.