



A global volunteer organization that improves the lives of women and girls through programs leading to social and economic empowerment.

SOROPTIMIST INTERNATIONAL OF THE AMERICAS, INC.®

## Club Charter Guide

Are you ready to charter a new club? Using the plans you have already developed with your charter team using the [BEFORE YOU CHARTER Guide](#), you are ready to take the next steps and build up a new club in your region! This step-by-step guide will lead you through the bulk of the work that takes place to charter a new club.

During this implementation phase of the charter process, you will complete the following:

1. Community Outreach & Recruitment
2. Informational Meetings
3. Club Logistics
4. Charter Application
5. Celebration!

### 1: COMMUNITY OUTREACH & RECRUITMENT

Go out into the community and engage with the local stakeholders right away! Make sure everyone is on board and excited that a new Soroptimist club is coming to their area, and show them the benefits that their community will receive.

You may wish to reach out to local officials, schools and universities, other women's organizations, businesses and social service providers. Be sure to keep track of the names and contact information of everyone you speak with.

Throughout this outreach stage, create a list of potential members; start with the names of colleagues, relatives, and friends, as well as professionals who may be listed in local directories. Next, reach out to *everyone* on your list! You may wish to send a formal invitation letter to some prospects, but using email or social media will lead to faster turnaround and will be more convenient, especially for younger women.

Your recruitment efforts should be visible in the community—[post fliers and place ads](#) to market the newly forming club, and make visits to local businesses and officials to personally welcome them to membership. Attend community events and distribute pamphlets with information about Soroptimist and invitations to the next meeting. Ask everyone you meet with for a name of someone they know who may be interested in joining!

Remember to follow up with prospects who express an interest as quickly as possible. In our fast-paced society, individuals can lose interest in an endeavor quickly unless regular communication is maintained—so keep all of your prospects in-the-loop!

## 2: INFORMATIONAL MEETINGS

The goal of an informational meeting is to generate enthusiasm among prospective members about Soroptimist.

Remember to keep it simple! Provide enough information to demonstrate the benefits of belonging but try not to overwhelm the attendees. Focus on the ways Soroptimists improve the lives of women and girls through our Dream Programs.

Select a quiet venue, appropriate for a meeting. Keep the meeting to one hour and respect the potential members' valuable time. To invite the community to the meeting use materials in the membership section of [www.soroptimist.org](http://www.soroptimist.org) such as:

- [sample invitation and follow-up letters](#)
- [sample press release](#)
- [sample meeting agenda and script](#)

During the informational meetings, identify key people who seem excited about the new club and whose energy and enthusiasm is contagious. Look for those who are especially well-connected in the community. These women will be critical in making the new club part of the community and attracting additional members. You'll also begin to identify who will be the charter club president and other officers, as natural leaders arise in the group you gather.

You may wish to hold an additional informational meeting or event for planning, socializing with future club members and introducing new prospects until the group has grown large enough to charter. As soon as you reach 12 committed members, you will be eligible to submit the charter application!

## 3: CLUB LOGISTICS

Once your club has recruited a core group of committed members (even if you do not yet have 12 members required to charter), you are ready to begin making the important logistical decisions needed to make the new club a reality!

During this step, the new club will make decisions about the following:

- New club's name
  - Must include a geographical identifier
- Club bylaws
  - Use [SIA sample club bylaws](#) as a template
- Budget/finances
  - Open a club bank account
  - Establish a budget for the club year (refer to [sample budget template](#))
  - Determine annual club dues
  - For clubs in the USA: Obtain an EIN number from the IRS
- Process of incorporation if required in your state
- How often and where the club will meet
- Elect club officers

- Plan the club's first project
  - As a special welcome gift, SIA funds each club's first \$1,000 Live Your Dream Award given during the first two years after chartering!

An experienced member or representative from the region should speak to the responsibilities of Soroptimist to ensure that all members of the chartering club understand what is expected of them. Go over the financial and time commitments at the region, federation, and international levels, including dues and conference or convention fees.

Use the [Club Administration](#) section of the SIA Website as a guide and reference as you tackle the administrative tasks as part of this meeting. There you will find resources such as position descriptions for club officers, a club calendar of events, and information about parliamentary protocol.

Once all of these logistics have been established, and 12 members have been recruited, the club is ready to apply for a charter from headquarters!

## 4: CLUB LOGISTICS

To apply for a charter, all of the following must be submitted to SIA Headquarters:

- [Form B: Charter Application Form](#)
- [Form 5008](#) for a minimum of 12 regular members
- Payment of dues and fees as appropriate
- Club Bylaws

The official charter will be mailed to the region governor for her signature and presentation to the club at the charter event; allow four weeks for delivery of the charter. The charter club president will receive a welcome packet with congratulatory messages and important information from SIA.

Shortly after the new club has officially chartered, headquarters will send the appropriate forms to new clubs in the USA ("subordinate") to facilitate inclusion in the group exemption from federal income tax under Soroptimist International of the Americas, Inc. - a 501(c)(3) organization ("central organization"). Soroptimist clubs that submit the appropriate documentation to headquarters, and subsequently receive confirmation from headquarters, are included in the group exemption granted by the IRS, which enables the clubs to also exist as 501(c)(3) organizations.

## 5: CELEBRATION!

After a minimum of 12 regular members have committed to membership and the required paperwork is completed, it is time to celebrate!

The charter celebration is the occasion where the region governor (or another official whom she designates) presents the charter to the new club. You can make this event as formal or informal as you wish. The important thing is to be creative and make it meaningful for your new club members. Inviting region leadership and members from other clubs is a great way to reinforce the connection of the new club to the larger Soroptimist organization.

The charter date and charter celebration rarely (and do not need to) coincide. The celebration should take place after all of the steps to charter as outlined in this guide are completed.

Next, use the [Club Mentor Guide](#) as a resource throughout the charter club's first year.