



Membership Basics

#SIAConv2024

Soroptimist International of the Americas, Inc.

Meet Your Presenters



Sandra Jennings

President, SI/Port Orchard, WA
Northwestern Region



Luz Aponte

Manager, Membership
SIA Headquarters

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Learning Objectives

- 1 Understand how to leverage your Region Membership Chair.
- 2 Review membership basics to retain and gain members.
- 3 Navigate the new database and Member Portal.



Our Strong History



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Where it all began...in 1921 Oakland, California



Strategic Engagement Goal

Members and supporters will find value through ENGAGEMENT with our mission, programs, and events.





Membership Engagement Objectives:

- Expand leadership development opportunities
- Improve the quality of engagement
- Increase NEW clubs
- Increase members

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STRATEGIES:



Prepare our members to become effective leaders



Support our new clubs



Support membership recruitment & retention

How do we **PREPARE** our members to become **EFFECTIVE LEADERS**?

Leadership Opportunities – Mark Your Calendars!

- June 24-25, 2025, Leadership Round Table (Virtual)
- June 28, 2025, Soroptimist Leadership Fellows Program (Virtual)
- #SIALeadToAchieve



How do we support our NEW CLUBS?

BE A MENTOR!

AFTER CHARTER - MENTOR GUIDE



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- FOR CLUBS
- Member Retention Tools
- Chartering New Clubs
- Club Administration
- Forms
- Pay Dues
- Welcome New Clubs
- Best in Federation Club Awards
- Member Recruitment Tools

Chartering New Clubs

Chartering a new club is rewarding and maintains the vibrancy of our organization. The following materials provide direction, advice and forms that support the development of a new Soroptimist club. Be sure to check out Club Administration and Forms to get a more in-depth set of documents once you set up your club.

New Club Building Resources

- PDF Charter Overview
- PDF Charter Process Overview Diagram
- PDF Before Charter – Strategy Guide
- PDF Club Charter Guide
- PDF Club Charter Guide for Online Clubs
- PDF After Charter – Mentor Guide

Forms for Charter Clubs

- DOC Form A: Declaration of Intent to Charter
- DOC Form B: Charter Application
- PDF Form 5008: New Member Enrollment/Reinstatement 2023-2024
- PDF Form 5008: New Member Enrollment/Reinstatement 2021-2022-writeable

Sample Templates for Charter Clubs

- DOC Sample Informational Meeting Agenda and Script
- DOC Sample Invitation Letters and Phone Script
- DOC Sample News Releases
- DOC Club Budget - Sample

Additional Resources



Main responsibility as a mentor:



Guiding



Encouraging
Connections



Access to
support



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

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Soroptimist Club Mentor Guide

Thank you for all you have done to contribute to the creation of a new Soroptimist club! Once the charter celebration is over, a new club will continue to need guidance as they become fully welcomed into the region and our organization.

The charter team is uniquely positioned to take on the role of mentor. We appreciate all of the wisdom that you and your team will continue to offer as we welcome each and every new club into the fold so they become long-standing clubs who celebrate many future anniversaries!

Your main responsibility as a mentor to a new club is to ensure the new club is providing the benefits and experience that Soroptimist members value, in alignment with our organization's strategic plan. That means guiding them towards mission-based work with our global Dream Programs, encouraging connections with Soroptimists all across our organization, and making sure they know how to access all of the support available from SIA headquarters.

Please see the guide below and use these tips as an overview of possible ways you and your team may provide this essential outreach to a newly chartered club at different points during their first Soroptimist year.

Priority Items – in the first 2-3 months after chartering:

- Make sure the club officers have accessed the [club administration webpage](#) for all of the operational resources they need.
- Review the importance of [club liability insurance](#) with the officers. If not in US, one of the US territories or Canada, discuss how to procure.
- Provide advice and best practices about fundraising locally as the club plans its budget.
- Ensure the club has secured a checking account with two signatories.
- Advise the club as they plan for participation in [SIA's global Dream Programs](#), in particular remind them of the \$1,000 funding that SIA provides for their first Live Your Dream Award recipient and setting up a Dream It, Be It committee to explore possible hands-on service projects.

July/August

- Ensure the club has identified their board and committee members for the new club year.

1709 Spruce Street | Philadelphia, PA 19103 | 215-893-9000 | siahq@soroptimist.org | Soroptimist.org | LiveYourDream.org
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Does your region have a mentoring program?

Tell us about your experience!

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Now the important part...

FOLLOW-UP!

NEW IDEAS
ENERGY

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*Improving the lives of women and girls
through programs leading to social
and economic empowerment.*

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Prospective Members Checklist

Soroptimist works hard to promote its programs, with the ultimate goal of helping to increase its membership ranks so that even more women and girls can receive the assistance they need. Is your club prepared to welcome prospective members? To provide information to those who wish to learn more? To invite interested women to participate in your club's projects?

Following are some tips for engaging prospective members.

- Respond in a timely manner.** We've all heard the phrase about striking while the iron is hot. Don't miss the opportunity to engage a potential member or volunteer who is interested in joining your club NOW. Follow-up with emails and phone calls as soon as possible, and create a good "customer service" experience.
- Obtain contact information.** Gather as much information as you can including name, address, phone number(s) and email.
- Ask questions.** How did they hear about Soroptimist? Are they interested in joining the club? What women's issues are they passionate about (trafficking, economic empowerment, etc.)? Do they want more information and/or to make a financial donation to the cause?
- Direct them to SIA's website.** Most likely, prospective members and other volunteers have access to the internet. Send them to SIA website – www.soroptimist.org and/or the following useful links:
 - [Who We Are](#)
 - [Our Programs](#)
 - [Our Impact](#)
 - [LiveYourDream.org](#)
- Send prospects to SIA's social media sites for immediate engagement.** For all the latest Soroptimist news and conversation, prospective members and volunteers can follow Soroptimist on the following sites:



Remember, new members mean new ideas and new energy. It is critical to the long-term success of our organization – and the women we serve – that all clubs do their part to attract, engage and retain new members!



MEET & GREETS:

New or Prospective members

Monthly, quarterly, or annually

Virtual or in-person



MEMBER RETENTION

...begins before the new member's first day!



Are your members engaged and satisfied?

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RETENTION TIPS



**Club Toolkit for
resources**














Member surveys



**'Years of Service'
certifications**

Retention Tools

-  **Club Toolkit: Member Winback Resources**
This toolkit includes a sample timeline with associated phone scripts and email templates for connecting with members who have become less engaged or whose membership has lapsed.
-  **New Member Certificate-writeable**
-  **Sample New Member Survey**
-  **Capacity Inventory**
-  **Figuring Retention Rates**
-  **Welcoming & Inducting New Members >**
-  **Years of Service Membership Certificate-writeable**
-  **Sample Letter to Former Members**
-  **Sample Resigning Member Questionnaire**
-  **Keeping the Balance for Clubs**
-  **New Members Talk: Orientation Experience**



Website Resources



Membership Marketing



Goal:

- Retain and gain members

Objectives:

- Member renewals
- Increase membership



CUSTOMIZABLE PUBLICITY MATERIALS

Use your club's publicity chair and utilize the resources!



Visual Design

Logos, graphics, brand colors and fonts

[Access Resources >](#)



Messaging

Tools for consistent messaging and writing in Soroptimist style

[Access Resources >](#)



Customizable Publicity Materials

Templates to promote programs and membership

[Access Resources >](#)



How-To Guides

Tools to boost your club's publicity efforts locally and online

[Access Resources >](#)



SOROPTIMIST®

Manhattan Beach

[ABOUT US](#)

[OUR PROJECTS](#)

[BECOME A MEMBER](#)

Does your club have a digital platform?

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Why did you become a Soroptimist?

SI/Encarnacion - America del Sur



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Benefits of Membership



Personal Development & Connections



Access to a Team of Non-Profit Professionals



Mission-based Programs



Dream Programs

2022-2023

NEW MEMBERS were attracted as a result of:



Big Goal
Accelerator
Projects



959

New Members

234

New Members

179

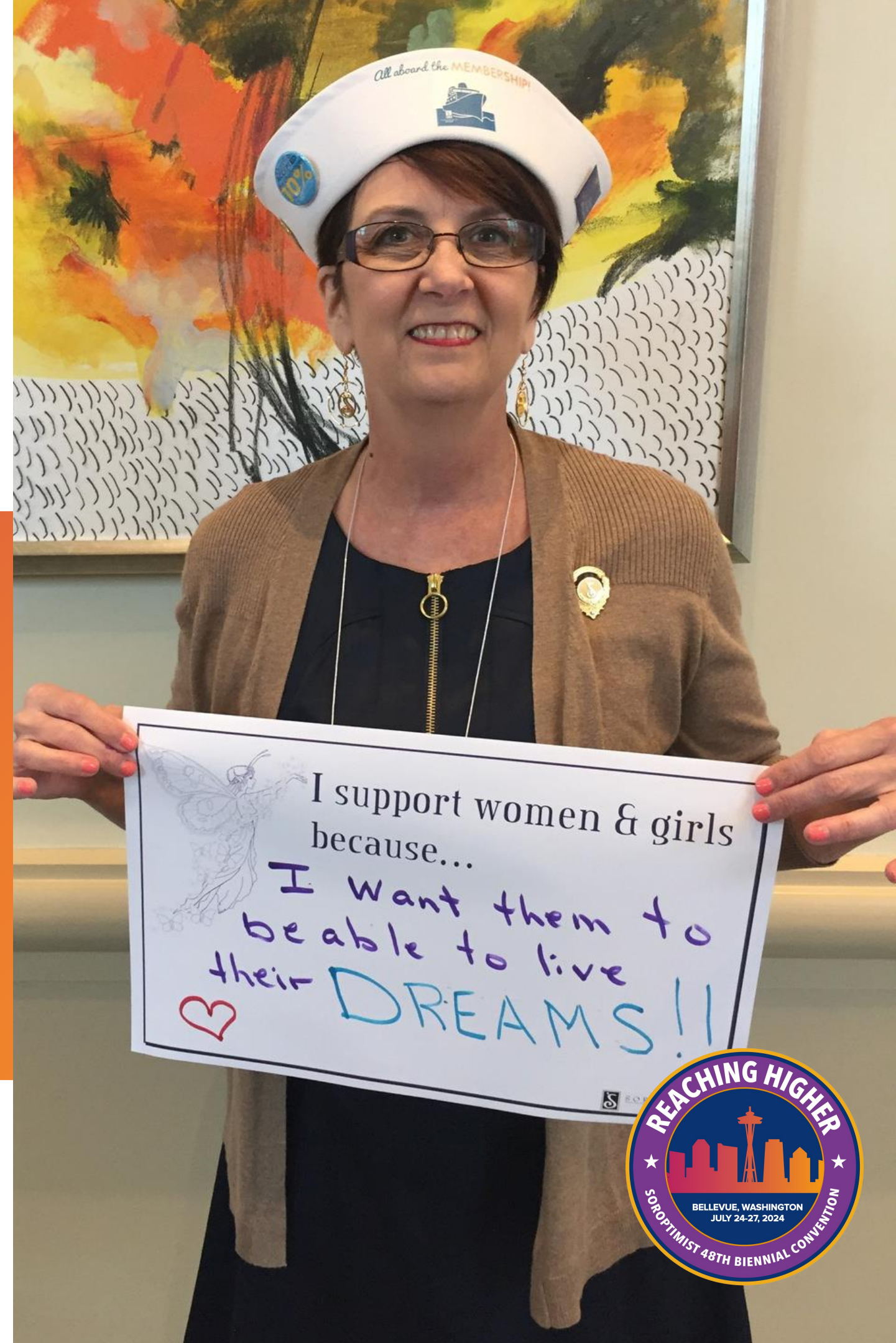
New Members



Share the BENEFITS of being a SOROPTIMIST!

Make sure the benefits are aligned with
our mission and are attainable!

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REGION MEMBERSHIP CHAIRS

Help keep Soroptimist strategically aligned



Region Membership Chairs

-  Increase NEW clubs by providing guidance to region teams
-  Increase members by providing retention and recruitment support
-  Increase quality of engagement by championing a quality member experience





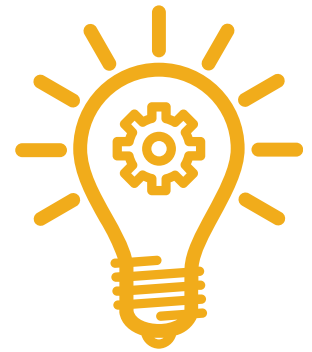
We are Soroptimists

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Storytelling for Member Recruitment



Brainstorming Activity

What experiences can you share that would inspire others to join?

Let's share our ideas!



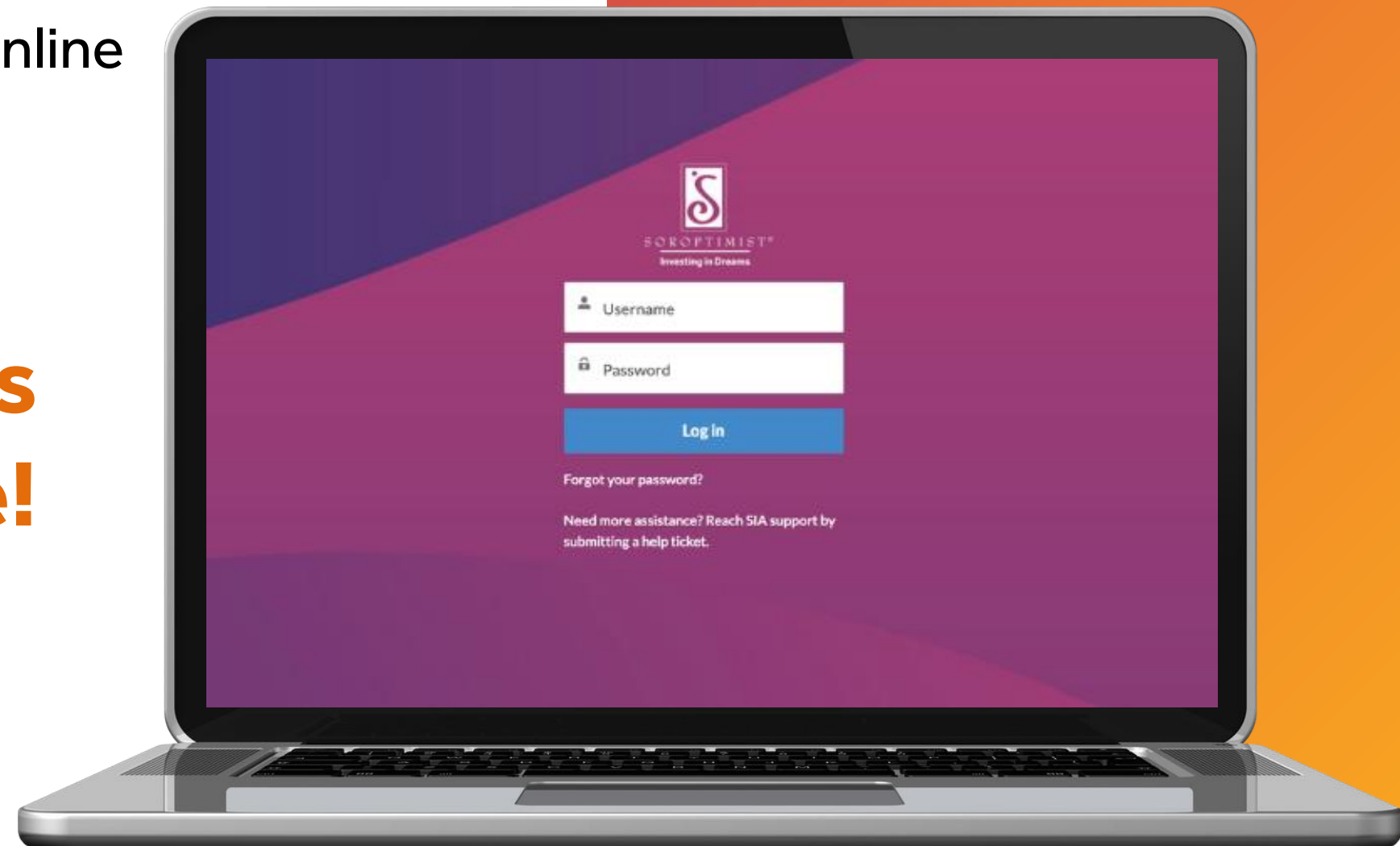
Soroptimist Member Portal

In June 2024, we hosted a series of live webinars to coach our club presidents and club treasurers on how to....

- View how to log into the NEW! Member Portal
- Understand how to manage your Club Roster
- View how to generate an invoice to Pay Dues online
- Understand how to ask for help

*****Ensure your club leader has a valid email address on file!**

#TechTalk 
MEMBER LEARNING LABS



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TAKEAWAYS

What was your favorite part of today's workshop?

What are you going to do with what you learned today?

Who is going to help you implement what you learned today?

When are you going to start using what you learned today?





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Investing in Dreams

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THANK YOU

 membership@soroptimist.org

 siahq@soroptimist.org

 +1 (215) 893 - 9000