

Club Meeting Mentoring Topics

August - International Convention and District Fall Workshop

September - PI Bylaws and P&Ps, District P&Ps, Club Standing Rules and P&Ps

October - Executive Board positions - President, President-Elect, Secretary, Treasurer,
and

Director roles

November - Appointees - PIFF Representative, Historian, Parliamentarian, and

Inspirational

Leader roles

January - Nominating Process

February - District Convention

March - Plan of Works document

April - Club History, Present Stats, and Recruitment

May - International Convention

June - Installation

Parliamentary Procedures Made Easy
By Joan McIntosh

Quorum:

- A. Required to hold a meeting.
- B. Required to vote on a motion.
- C. 1/2 membership plus one.

Club Minutes Distributed in writing by Secretary:

- A. No motion or second required.
- B. **Chair** asks for any change or correction to the distributed minutes.
- C. Hearing no changes, the **Chair** declares the minutes approved as distributed.
- D. Changes or corrections to distributed minutes.
 - 1) **Chair** requests the correction be reflected in the minutes.
 - 2) **Chair** declares the minutes approved as corrected.

Motions:

- A. I “move” that
- B. Requires a Second.
- C. A complicated motion should be presented to the **Chair** in writing.
- D. **Chair** repeats the motion.
- E. Discussion
 - a. If controversial, a time limit should be established.
 - b. Equal time for pro and con discussion.
- F. Voted called by the **Chair**.
 - a. **Chair** asks members to say yes or no (or to raise their hands or stand).
 - b. A close vote, the **Chair** designates a person to count the vote.
 - c. Required a majority vote, which is half of members attending plus one.

Amendment to a Motion:

- A. Requires a second.
- B. Quantifies or add parameters to the main motion.
 - a. Adjust the quantity referenced in the main motion.
 - b. Defines the time of the project/service.
 - c. Adds a place and/or location(s).
 - d. Expands or decreases the service/project to be provided.
- C. **Chair** repeats the amendment to the main motion.
 - a. Complicated amendment should be submitted in writing to the **Chair**.
 - b. **Chair** call for discussion of the amendment to the main motion.
- D. **Chair** call for vote.
- E. Amendment becomes part of the main motion if approved.
Chair repeats the amended main motion and call for the vote.

Standing Rules govern the Club's activities and are rules/regulations to be followed. Policies are how to carry out the rules/regulations.

Club Standing Rules:

- A. PI By-Laws changes filter down to the Clubs and Districts.
- B. Reviewed annually
 - a. Changes to PI By-Laws that affect the Club's Standing Rules requires an amendment to the Club's Standing Rules.
 - b. Committee of three established by the Executive Board.

Amendments to the Club's Standing Rules:

- A. Submitted to the membership, in writing, 30 days prior to voting.
- B. Voting on Standing Rule amendments.
 - a. Requires a quorum.
 - b. Requires a 2/3 vote of members for approval.
- C. Date of amended standing Rules is affixed.
- D. Amended Standing Rules are distributed to the members.

Policies:

- A. Establishes procedures to carry out the Standing Rules.
- B. Defines the duties of the Club Officers.
- C. Reviewed annually for addition/changes, in accordance with Standing Rule changes.
- D. No vote required.

Each member receives a copy of the Standing Rules and/or Policies after any amendment. All new members should receive a copy of the Standing Rules and Policies in the membership kit.

Special Committees:

- A. Audit committee:
 - a. Committee of three appointed by the President.
 - b. Review the Treasurer's records no later than August 31.
 - c. Submits a signed report to the Club President, Treasurer, and the Secretary.
 - d. Promptly returns the records to the current Treasurer following the audit.
- B. Nominating Committee:
 - a. At least three (3) members.
 - b. Elected no more than two (2) months prior to the district convention.
 - c. Verifies the nominee's qualifications.
 - d. Report slate of officers to the Executive Board.

Election of Officers:

- A. No later than one month prior to the district convention.
- B. Report newly elected Club Officers to PI and the District using the "Pilot Club Officer Form" provided on the PI Website located under 'Form'

Information from PI Website: Manuals, Parliamentary Procedure, Club Manuals, and Smart book.

Pilot International Acronyms

BOD—Board of Directors

COED-- Club of Evolving Districts

COL—Council of Leaders

COO/DOE—Chief Operating Officer/Director of Events

DAC—District Administrative Council

DEC—District Executive Committee

ECR—Executive Committee Representative

EC—Executive Committee

IAC—International Administrative Council

PEP—Pilot Expansion Program

PI—Pilot International

PIFF—Pilot International Founders Fund

PIHQ—Pilot International Headquarters

PIP—Past International President

PMU—Pick Me Up

ROLE OF SECRETARY

- need to be familiar with Parliamentary Procedure to properly record business transactions in to minutes
- minutes are legal documents and must never be destroyed
- minutes include what occurred, what needs follow up, committee assignments, pending business, what was voted on and outcome
- all business meetings must be recorded, including District Convention and DAC meetings
- minutes must include: name of District or Club, type of meeting (business or program), date and place of meeting, who called the meeting to order and time, who is presiding officer, attendees, time meeting adjourned
- record reports of committees
- review fax and email votes
- distribution: District Convention minutes within 60 days, Fall Workshop within 30 days
- assist the Governor: keep membership records, serve on Fall Workshop committee, send Notification of Change in Membership to District and Pilot International
- know types of membership: Emeritus, Honorary and Student

TREASURER DUTIES AND RESPONSIBILITIES

Set up a bank account with checks requiring two signatures.

Develop a budget with your Board/budget committee based on your plans of works and familiarize yourself with the categories.

All monies collected should be deposited in a timely manner and encourage use of transmittal forms.

Provide treasurer reports to be presented at meetings.

Reconcile monthly bank statements.

File 990-e-postcard with the IRS by November 15.

Post your deposits and disbursements to the correct funds (operating or projects). Remember operating funds can be used for projects, but project funds cannot be used for operating.

Provide the audit committee with all financial documents by July 31.

Other duties are listed in club/district manuals/ PI and club bylaws.

Any difficulties or questions or if you need assistance contact District Treasurer

Jean Ann Saville

Jsav181@aol.com

610-551-9075

CLUB PRESIDENT WILL . . .

- Set goals for the Club's year
- Prepare Agendas for Club and Executive Board meetings
- Preside at those meetings
- Oversee the club officers, appointees and club members
- Serve as a member of the Divisions and Standing Committees, and appoint Special Committees as authorized by the Executive Board
- Countersign vouchers and checks
- Authorize unbudgeted expenditures within the limits established by the Club's Standing Rules
- Appoint the Audit Committee and ensure the books are audited by Aug 31
- Attend District Fall Workshop and District and PI Conventions
- Be a Pilot Ambassador in your community – know Pilot, speak Pilot, promote Pilot
- Collaborate and Mentor the President-Elect
- Maintain and update Club's "official documents"

. . . PREPARATION

- Copy of current PI Bylaws
- Copy of Club's and District's Standing Rules and Policies and Procedures
 - Be familiar with basic Parliamentary Procedures (Robert's Rules of Order, 12th Edition)
- Keep a Calendar of Club, District and PI deadlines
- Use meeting Minutes to prepare Agendas
- Know the Secretary's duties and follow through (minutes, change in membership notifications, membership directory)
- Know the Treasurer's duties and follow through (pay bills, dues, tax forms, contributions to Pilot International
 - Be familiar with PI Resources
 - Use a variety of methods to communicate
 - Network with other Clubs and District leaders
- Have a solid plan for when District Officer visits the club

DOCUMENTS to have on hand

Club Brochure	Club Member Roster	Awards/Recognitions
Club Plans of Work	Standing Rules	Passwords/Logins
Club Budget	Policies & Procedures	Charter/Incorporation

Funding Sources

Raising Funds for Your Club

Internal v.
External



Donors &
Partners



Role – Playing



Fundraising &
Social Media



Fundraising &
Branding



Who We Are - Elevator Talk

Perspective Pilot: I've been looking for ways to volunteer but want something that really has an impact, you know? Do you know of any organizations?

Pilot: Absolutely! Have you heard of Pilot International?

Perspective Pilot: I don't think so. What do they do?

Pilot: They're all about bringing positive change to communities globally, focusing on brain health, safety, and supporting caregivers. It's a volunteer service group founded in 1921, based on the idea of "Friendship and Service."

Perspective Pilot: That sounds incredible. So, they're mostly in the U.S.?

Pilot: Actually, they're in the U.S., Bahamas, and Japan! They've got clubs worldwide, and they even recruit youth through their Anchor and Compass programs. It's amazing because today's youth members often become future Pilots themselves.

Perspective Pilot: I love the idea of joining something so focused on service and friendship. Where can I learn more?

Pilot: I can send you some info or bring you to the next meeting! They'd love to have more people involved.

10 Ways to Recruit Members

(many of these are from a web article “99 Ways to Get New Members for Your Organization” by Tatiana Morand)

1. Host a “bring a friend” meeting. Encourage members to bring someone to see how your organization is run. This could be a recurring event or policy so that new members are continually bringing new friends!

2. Offer an alternate meeting time to attract people with different schedules. Is your meeting time leaving out a whole group of people, like those with 9-5 jobs or early bedtimes? Switch up your offerings to attract more people—existing members and new!

(In Patchogue, we hold a Zoom meeting at the same time as our regular meeting so that members who cannot attend in person can still be involved.

3. Run member features in your newsletter. If your members are featured in the newsletter, they might feel more compelled to send it to friends, family, and colleagues to show off their involvement. And encourage members to share your newsletter. Especially if they’re featured in it!

4. Personally follow up with every prospect. When someone signs up for an event, email them directly and ask if they’d like to sign up for organization membership. You know they’re already interested in what you do—reach out!

5. Create a welcome packet for guests. Include things like the mission, calendar, and contact information, as well as information about becoming a member.

6. Sponsor a local event. ** Or become involved in community events – Alzheimer’s Walks, Street Fairs, Volunteer Fairs, etc. Include your club name and logo on promotional materials, and make sure event organizers have your club information for anyone who asks.

7. Give a talk about your club at other organizations. Share your mission and activities with others in your arena.

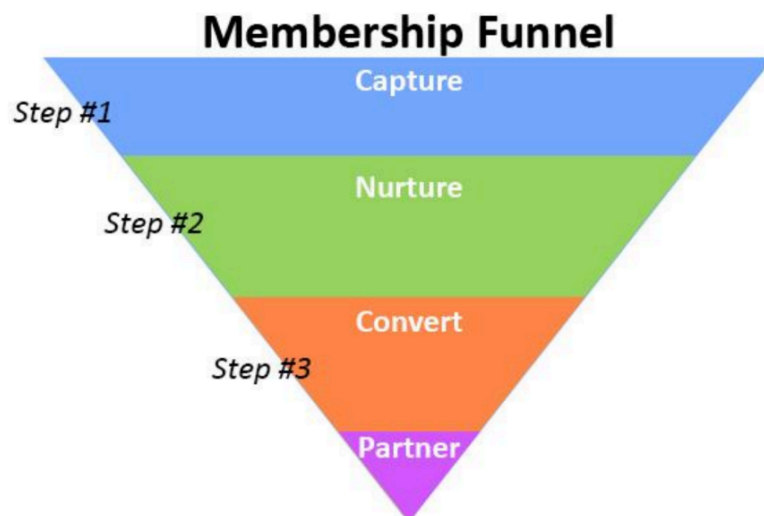
8. Encourage members to share club activities on social media. Create a photo release package so that you get permission to tag them in pictures. This will ensure the photos show up in their friends’ feeds as well.

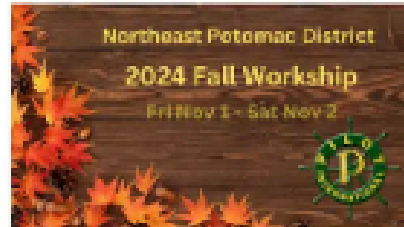
9. Create an informational brochure about your club. Include the club's mission and activities, as well as contact information.

10. Send media releases to local outlets when your club completes a project. Learn to write a press release so you can attract media attention to your club.

Here's a breakdown on how the membership funnel creates new members for your nonprofit or organization:

- **Step 1: Capture.** Prospective members are "captured" when they're looped into your organization's workings, be it by email newsletter, attending an event, or word of mouth.
- **Step 2: Nurture.** Send follow-up emails, mailers, or phone calls nudging prospective new members along the path to signing up. Make prospective members feel appreciated and valued with personalized attention, especially if they've shown you interest!
- **Step 3: Conversion.** Offer incentives to signing up, like membership benefits. You might also emphasize key aspects of the membership experience, like networking or community impact.





Staying In The Know

Websites:

Pilot International:

www.Pilotinternational.org

Members only section password: truecourse

Our District Website:

www.Pilotnepot.org

Members only sign in: click create account & follow directions

Social Media:

Facebook pages:

Pilot International Headquarters

Pilot Connection (group by PI)

Pilot International

Northeast Potomac District - Pilot International

Information on How to Create a QR Code:

QR Code generator sample websites:

The following websites have free trials - you have to cancel membership after free trial:

QR-code-generator.com

The-qrcode-generator.com

Qrcode.monkey.com

has unlimited codes that can be generated but this is not a free trial



Mentoring Matters Packet

by Lisa Palmquist

[CLICK HERE for pdf](#)