

MAY THE
FORCE

BE WITH YOU



PRESIDENT'S WORKSHOP

2024 DISTRICT THREE CONFERENCE, ATLANTA, GEORGIA



Presenters:

LaShone Surrency

Leadership Training Chair

District Three

Kathy Folley

Past International President

NOW THAT YOU ARE PRESIDENT ...

- **What did I get myself into?**

- **What's next?**

- **What do I have to do?**

- **When do I have to do it?**

- **How can I get help?**



WORKSHOP AGENDA



- **President's Checklist**
- **Websites And Resources**
- **General Responsibilities**
- **Club Presidents Handbook**
- **Goals**
- **Group Tally**
- **Agendas And Meetings**
- **Cyber Fraud**

PRESIDENT'S CHECKLIST



- Study the President's Handbook and Club Bylaws
- Select and appoint Committee Chairs and have members join their committees
- Meet with Committee Chairs to discuss club goals and budgets
- Ask Chairs to meet with members to set committee goals based on strategic plan
- Decide on projects for the year
- Make sure committees are mindful of budget amounts and send requests for funds to the Treasurer
- Update roster of officers and committee chairs in Group Tally; you may delegate this job to the Treasurer
- Submit Club Annual Report online by the deadline. It is used to determine Distinguished Club designation

SEARCH ALTRUSA INTERNATIONAL AND DISTRICT WEBSITES

Resources can be found
in multiple places...



WEBSITE SIGN-IN



International Website:

www.altrusa.org

Username: altrusan

Password:

MamieBass1955

Access to all but Group Tally

District Three Website:

www.districtthree.altrusa.org

PRESIDENT'S

RESPONSIBILITIES & DUTIES



CLUB PRESIDENTS



Resources below will be handy to keep close when making decisions for your Club:

1. LEADERSHIP TOOLKIT
2. STRATEGIC PLAN
3. GROUP TALLY TOOLKIT
4. PARLIAMENTARY PROCEDURE
5. CLUB ANNUAL REPORT

AVAILABLE ON INTERNATIONAL WEBSITE UNDER THE LEADERSHIP TAB

CLUB PRESIDENT'S HANDBOOK

**Available on Altrusa
International Website:**

Leadership Tab

1. **LEADERSHIP** – how to become a more successful leader
2. **PLANNING & EVALUATING** – setting your vision
3. **PRESIDING** – effective meeting management
4. **WORKING WITH THE BOARD** – develop positive relationship
5. **CLUB FINANCES** – ultimate responsibility
6. **MEMBERSHIP DEVELOPMENT** – to educate and motivate
7. **ASTRA** – making an ASTRA Club successful
8. **ALTRUSA IN THE PUBLIC EYE** – presenting unified appearance
9. **COMMUNICATIONS** – communication tips for Presidents
10. **FILES & REPORTS** – permanent and working files
11. **AWARDS** – giving recognition for jobs well done
12. **ALTRUSA INTERNATIONAL FOUNDATION** – a 501(c)3

IMPORTANT DIGITAL PAPERWORK TO SUBMIT



- **ROSTER OF CLUB OFFICERS/COMMITTEE CHAIRS**
ENTER IN GROUP TALLY
- **CLUB VISIT REQUEST FORM**
FROM DISTRICT BOARD MEMBER PRIOR TO CLUB VISIT
- **AWARD NOMINATIONS**
GUIDE THE SUBMISSION OF AWARD APPLICATIONS
- **LIST OF CONFERENCE DELEGATES**
TO DISTRICT SECRETARY FOR CONFERENCE VOTING
- **CLUB ANNUAL REPORT**
ANNUALLY SUBMIT TO INTERNATIONAL ELECTRONICALLY
- **STRATEGIC PLAN**
REVIEW/ SUBMIT TO GOVERNOR AND GOVERNOR-ELECT

CLUB ANNUAL REPORT

This is the email you received March 15 for access to the **Club Annual Report Form**.

We recommend you print the questions first, fill in the answers then apply to the Report Form via Survey Monkey.

This email is being sent to all Club Presidents, Vice Presidents, and Presidents Elect.

2021-2022 Club Annual Report

March 2022



It is Club Annual Report time again. It contains 23 questions to help us record important data which will be provided to District and International Boards to help us better serve our clubs. Clubs can also use the report to get ideas for how they can become stronger. Please answer the questions for the club year April 1, 2021, through March 31, 2022.

You need to score 65% and have charter status to become a 2021-2022 Distinguished Club.

Please read the following instructions carefully:

- Once you have responded to all the questions you will click the Submit button at the end of the survey.
- Your summary page will only include questions that have points assigned to them. Questions 1, 5, and 15 will not appear on your summary. You can print this page. You will need to make note of your responses to Questions 1, 6, and 15.
- If you'd like to review your submissions, or change a response, you simply go back to the link you received from International and you will be able to see your responses and edit them.
- When editing, two things to keep in mind: 1. You must use the same device you originally submitted from, and 2. You must go to the last page and hit the submit button again if any changes were made. Otherwise the changes will not be recorded.
- Editing will be turned off after the deadline of June 1, 2022.

As a reminder - it is important for all clubs to complete the Club Annual Report for the purpose of assessing local, District and International progress annually. The report is available now and **due June 1, 2022**.

We look forward to receiving your report.

[Club Annual Report Form](#)

Powered by Survey Monkey





2021-2022 Club Annual Report (April 1, 2021-March 31, 2022)

Score: 74.2%



92/124 points

You will receive your **score** immediately and anything above 65% with charter status will earn you the Distinguished Club Award.

2. Total Membership (10 points)

- 0-14 members
- 15 or more members

10/10 points

Page 1/6

3. Which International Award entries did your club submit to District? (check all that apply.) (15 points possible)

- Mamie L. Bass Service Award
- Letha H. Brown Literacy Award

Page 2/6

This is a report card for our District and we need the help of EACH CLUB to submit this simple 23 question form.

This is where Districts and International track important data such as total number of Award Entries, Service and Volunteer Hours, Leadership Roles and Training. This data helps to better serve each club.

LEADERSHIP TASKS



- PROMOTE A VISION
- IDENTIFY PRIORITIES
- INITIATE AGENDA, DIRECTION AND STRATEGY
 - RECRUIT PEOPLE FOR KEY POSITIONS
- MOTIVATE, INSPIRE AND CONNECT MEMBERS
 - CREATIVELY EXPLORE OPTIONS
 - ACTIVELY SEEK RESOURCES
 - SUCCESSION PLANNING

WHAT MAKES YOU A GREAT LEADER?

True leadership lies in
guiding others to success



SET YOUR GOALS

Take action

Those that set goals for themselves are more likely to achieve success. We like the SMART approach. . .



GROUP TALLY TALK

FOR PRESIDENTS



GROUP TALLY

Member Management



- To sign into Group Tally platform for the first time, your email address must be in the system. Obtain Full Administrative rights from your previous Club President or previous Treasurer.

- For detailed instructions see Group Tally PDF guides and tutorials, on the International Website under “Leadership tab”, scroll to “Club Treasurer” and “Group Tally Toolkit”.

- Club Presidents should be familiar with Group Tally, but we recommend your Treasurer make all edits and payments.

GROUP TALLY TOOLKIT

Very IMPORTANT to
keep your Club Roster
Updated

Guides

Download PDF Guides for using Group Tally



How to Login

LEARN MORE



How to update Club officers

LEARN MORE



How to add a payment method

LEARN MORE



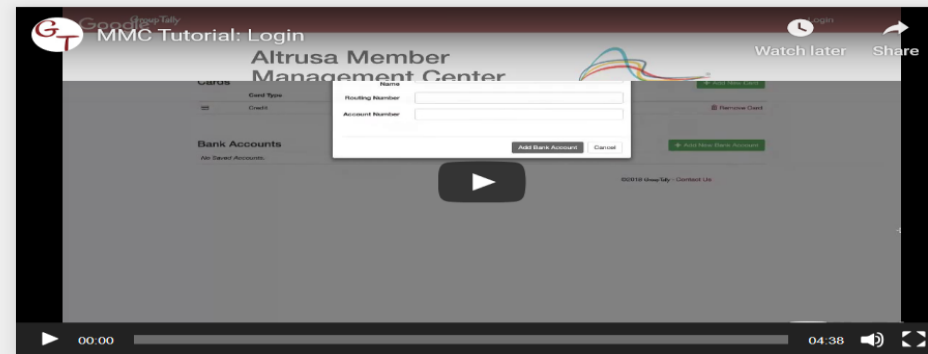
How to make a payment

LEARN MORE

Videos

Watch video instructions to help you use the Altrusa GroupTally platform

How to Login



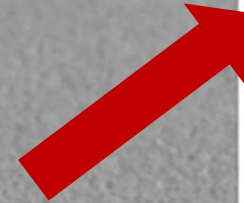
AVAILABLE ON INTERNATIONAL WEBSITE UNDER THE LEADERSHIP TAB

To Access Group Tally Click On **SITES TAB**



MEMBERSHIP SERVICE COMMUNICATIONS LEADERSHIP GOVERNANCE CONVENTION **SITES** LOGOUT

- ALTRUSA HOME
- GROUP TALLY
- FOUNDATION LOGIN
- ASTRA LOGIN
- ALTRUSA STORE
- ALTRUSA SERVICE DATABASE



Group Tally

LOCATE EXISTING MEMBERS

Edit by **Search Bar** or clicking their **Name** on the Members page

Members

Download Members (CSV)

Search




Filters (Clear All)

Current Member: Current (X)

Display P

Showing 10 / 24 (39 total)

Member	Email	Member Type	Current Member  filter
Lou Acuff	lou.acuff@gmail.com	Active	true
Julia Allen	julia@billallen.com	Active	true
Meg Black	megelgohary@gmail.com	Active	true
Denise Burry	denise65fl@embarqmail.com	Active	true
Laura Byrd	byrdl@lssc.edu	Active	true
Lori Davis	ldavis@insightcreditunion.com	Active	true
Margaret Fuller	pfuller@gate.net	Active	true
Traci Gamble	tracingamble@gmail.com	Active	true
Dinah Henderson	dinahenderson@centurylink.net	Active	true
Meredith Kirste	mmkirste@earthlink.net	Active	true



USE THE **“EDIT”** LINK TO ADJUST ROLES THAT ALREADY EXIST.

*If member's term has no end date, or needs to be adjusted, use the edit feature instead of removing a position.

Membership					Personal Information	Member Information	Contact Information	Transactions
Group Membership								
Group	Membership	Leadership Position(s)			Administrative Role			
District Three	Finance Chair 6/1/15 - 5/6/17 (Past)		Edit · Remove		Full Admin Edit			
	District Treasurer 5/6/17 - 5/1/19 (Current)		Edit · Remove					
	Add Leadership Position							
Lake County, FL	Active 5/30/99 - Future (Current)		Treasurer 6/1/08 - 5/31/12 (Past)		Edit · Remove		Member Edit	
			President 6/1/12 - 5/31/14 (Past)		Edit · Remove			
			Webmaster 6/1/16 - Future (Current)		Edit · Remove			
			Add Leadership Position					

*We would like past roles to remain listed so there is a record of positions each member has held

Personal Information, Member Information, Contact Information and see Transactions of Dues and Fees, click Edit

MAKE UPDATES FROM THE MEMBERS PAGE

Membership		Personal Information	Member Information	Contact Information	Transactions
Group Membership					
Group	Membership	Leadership Position(s)			Administrative Role
District Three		Director 4/18/15 - 4/27/16 (Past) Edit · Remove			Full Admin Edit
		First Vice Governor 4/27/16 - 5/6/17 (Past) Edit · Remove			
		Communications Chair 5/6/17 - 5/1/19 (Past) Edit · Remove			
		ASTRA Chair 5/5/19 - 4/25/21 (Past) Edit · Remove			
		District Treasurer 4/25/21 - Future (Current) Edit · Remove			
		Add Leadership Position			
Ocala, FL	Active 4/30/07 - Future (Current)	Treasurer 6/1/15 - 6/11/20 (Past) Edit · Remove			Admin (View Only) Edit
		Add Leadership Position			

Do NOT delete past roles listed so a record of positions remains intact

AGENDAS AND MEETINGS

PRESIDENT'S PLANNING



AGENDA PLANNING

1. BE AS SPECIFIC AS POSSIBLE
2. INCLUDE ACTIONS (VOTES, SIGN-UPS)
3. CONSIDER A TIME LIMIT ON EACH ITEM
4. DISTRIBUTE BEFORE THE MEETING



A WELL-CONCEIVED AGENDA ASSURES AN EFFICIENT AND PRODUCTIVE MEETING

AGENDA FORMATTING

DEVELOP YOUR AGENDA AROUND THE FORMAT:

- Minutes from previous meeting
- Reports of Officers
- Reports of Standing Committees
- Reports of Special Committees
- Correspondence
- Unfinished Business
- New Business



MEETING CHALLENGES

Losing Focus

- DISCUSSION OFF AGENDA OR POINT OF MEETING
- EXCESSIVE DIGRESSIONS
- LACK OF PARTICIPATION BY SOME OR DOMINATION
- NO CONCLUSIONS OR DECISIONS
- SIDE CONVERSATIONS

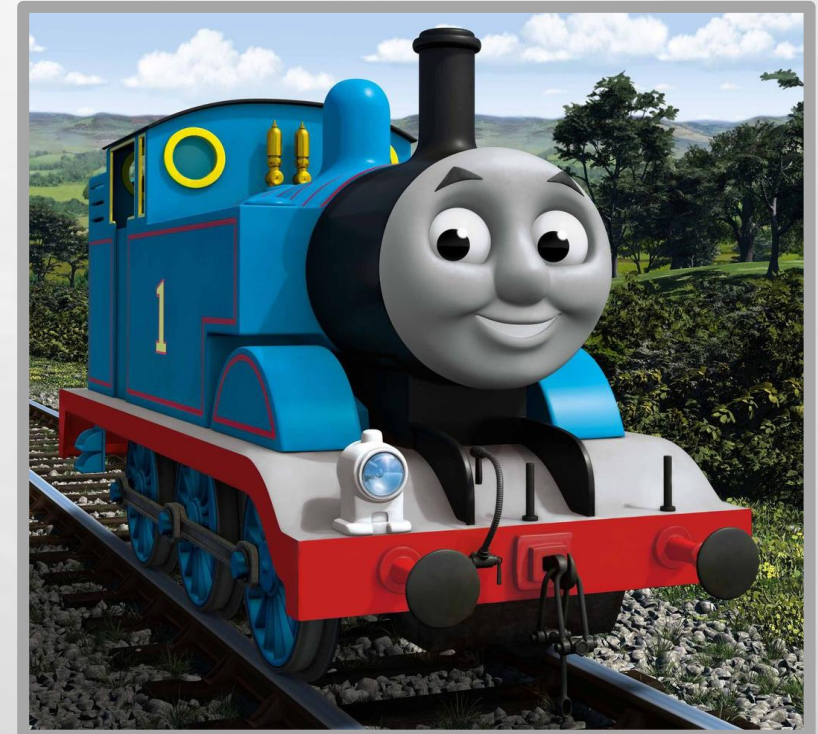


MEETING CHALLENGES

Corrections

GETTING BACK ON TRACK:

- REMIND PURPOSE OF MEETING OR AGENDA ITEM
- CLARIFY QUESTION ON TABLE
- SUMMARIZE DISCUSSION
- RECOGNIZE CONTRIBUTIONS
- CONTROL DISRUPTIVE BEHAVIOR
- TABLE ITEMS, IF NO DECISION CAN BE MADE

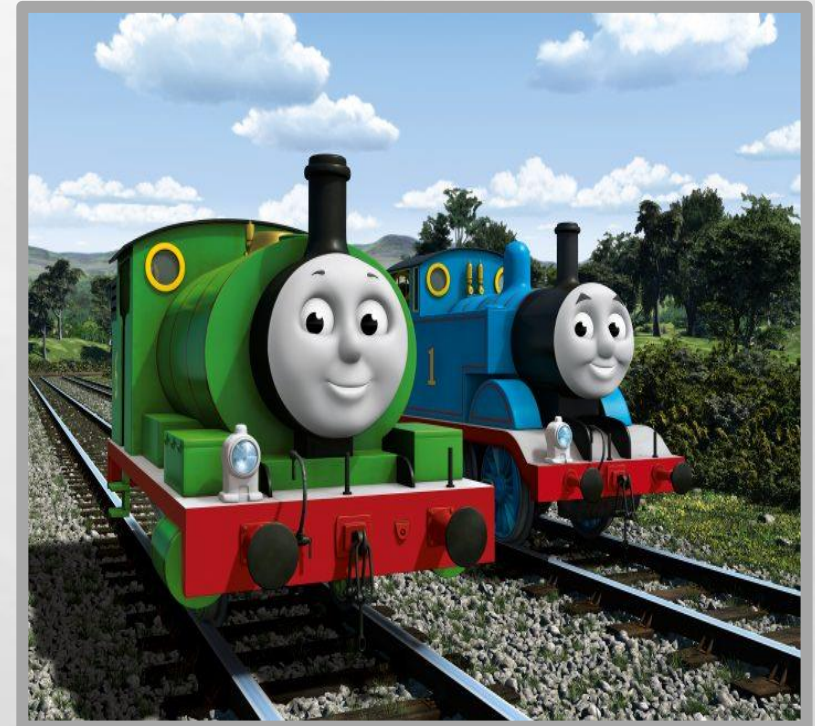


USE ROBERTS RULES OF ORDER WHEN AN ISSUE NEEDS CALMING

MEETING CHALLENGES

Lack Of Participation

- KEEP MEETING FOCUSED
- ENCOURAGE QUIET MEMBERS AND CONTROL EXCESSIVE TALKERS
- MAKE SUGGESTIONS, ALLOW SILENCE AND LISTEN CAREFULLY
- PAY ATTENTION TO EACH MEMBER
- REINFORCE PARTICIPATION



TAP INDIVIDUAL TALENTS, STRENGTHS AND INTERESTS AND ASK FOR INPUT

MEETING CONCLUSION



CONCLUDING YOUR MEETING:

- Review progress and decisions
- Review assignments, due dates and checkpoints
- Develop items for next agenda
- Thank participants

MEMBER RECOMMENDATION FORM

Forms located on
the District Three
Website under the
“About Tab”



Altrusa International of _____

Recommendation for Membership

Name _____

Home address _____

Home phone _____ Work phone _____ Cell phone _____

Would you prefer to be contacted at: Home Work Cell (please check one)

E-mail address _____

Other club/organization affiliations:

Why do you want to join Altrusa?

Birthday _____

Month Day Year

Profession/Occupation _____

How do you want to receive your publications Hard Copy Electronically

Sponsor Name _____

Sponsor's ID# _____

Co-Sponsor _____

Co-Sponsor's ID# _____

Date Initiated _____

Membership Committee Area:

Altrusa Board

Approved

Not approved

Date _____

Initial _____

Approved

Not approved

Date _____

Initial _____

NEW MEMBER FORM

Individual Renewal and Reinstating

Please do NOT mistake a Reinstating member for New



ALTRUSA INTERNATIONAL DISTRICT THREE, INC.
2023-2024 DUES & MEMBERSHIP INFORMATION FORM



(PLEASE PRINT)

Altrusa International of _____ Member ID# _____

- RENEWING MEMBER REINSTATING MEMBER NEW MEMBER TRANSFERRED MEMBER
 ADDRESS CHANGE DECEASED AFFILIATE LEAVE OF ABSENCE

Full Name _____ Birthday _____ (month) _____ (day)

Address _____

City _____ State _____ Zip _____

Home/Cell/Work Phone _____ Email _____

Firm/Corporation/Organization _____ Title/Position _____

Business Address _____ City _____ State _____ Zip _____

Club/Organization Affiliations (positions held) _____

Sponsor Name _____ ID# _____

Co-Sponsor Name _____ ID# _____

MEMBERSHIP DUES INFORMATION:

- International Dues (Pay online Group Tally) \$55.00 SEND PMT TO INTERNATIONAL OFFICE
 Intl Young Professional Dues (Pay online) \$27.50 SEND PMT TO INTERNATIONAL OFFICE
 International Processing Fee (All New Members) \$10.00 SEND PMT TO INTERNATIONAL OFFICE
 International Half Year Dues (12-1 thru 3-31) \$27.50 SEND PMT TO INTERNATIONAL OFFICE
 District New/Renewing/Reinstating Member \$25.00 \$ _____
 District Young Professional Dues \$12.50 \$ _____
 District Late Fee (Renewals after June 15) \$ 2.00 \$ _____
 District Half Year Dues (Received 12-1 thru 3-31) \$12.50 \$ _____
 Club Dues \$ _____

TOTAL DUE TO CLUB: _____ TOTAL TO DISTRICT \$ _____

Date _____ Date Dues Received by Club _____

Signature of Club Treasurer _____

Daytime Phone Number _____

Email Address _____

TREASURER IMPORTANT: Make Checks for District Three Dues Payable to "Altrusa International District Three, Inc."

Mail District Dues to Altrusa International District Three, Inc. Treasurer: Scott Frieser 13212 Providence Green Ct, Charlotte, NC 28277

Pay International Dues to Altrusa International, Inc. on Group Tally

CYBER FRAUD

PROTECT YOURSELF AND YOUR CLUB



CYBER SECURITY STATISTICS:

- The rate of cybercrime increased by 600% during COVID-19
- There was a 55% increase in victims over the age of 60 in 2022
- Cybercrime damages in 2022 were about \$6 trillion worldwide
- Phishing attacks account for 90% of data breaches
- 65% of US organizations fell victim to a phishing attack in 2021

TO PROTECT YOURSELF, WE URGE YOU TO:

- Periodically change your passwords and **use two factor authentication** whenever possible
- Monitor online banking – report suspicious activity
- Monitor email accounts – if any unusual activity, update anti-virus software
- Be wary of phone calls of unknown origin
- Be wary of clicking on links and attachments from senders you do not recognize and even some you do
- Never wire or send funds without **authentication**

HOW CAN YOU PROTECT AGAINST CYBER FRAUD?



HOW TO IDENTIFY A PHISH



From: **Shannon Schell** <fortkb11@gmail.com>
Date: Thu, Jan 13, 2022 at 1:42 PM
Subject: Re: Hello Scott
To: <scottaltrusa@gmail.com>

Good Day Scott , Need you to do something for me ?

Let me know if you are free.

Shannon Schell

--
 [Altrusa International](#)

The scam often relies on impersonation, and phishers can be very good at it. You may get a phishing email that appears to come from a family member, friend or colleague. Altrusa has been a target of these for years now. Pay close attention to the sender's email address if it does not match the person they are attempting to impersonate.



WAYS YOUR PHONE CAN BE HACKED



**Downloading
a malicious app**



**Clicking
suspicious link**



**Unsecured
public Wi-Fi**

PREVENT HACKING

Three of the most common methods of being hacked on your phone or computer, occur when you are downloading, clicking a link or using unsecured public wi-fi.



QUESTIONS

ANSWERS

**T H A N K
Y O U**

For Your Service to ALTRUSA