

ROYAL NEIGHBORS OF AMERICA®



**INSURING LIVES  
SUPPORTING WOMEN  
SERVING COMMUNITIES<sup>SM</sup>**



# Chapter Leadership Planning Guide

# Chapter Leadership Planning Guide

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## Leadership Roles and Responsibilities

### Building Your Team

Congratulations on being elected or appointed to an officer position for your chapter! Below are the roles and responsibilities for each position:

#### **Adult chapter leadership team includes:**

##### **President:**

- Elected position
- Leads chapter meetings
- Ensures reports are completed and submitted in a timely manner
- Appoints the Event Planner and Social Media Coordinator by March 1
- Must be female
- Must be a member in good standing of Royal Neighbors

##### **Secretary-Treasurer:**

- Elected position
- Balances the records and accounts of the chapter
- Reports on the chapter's financials during meetings
- Enters chapter activities into the online reporting tool as they occur
- Completes and submits all quarterly and year-end reports in a timely manner
- Maintains meeting minutes
- Balances the records and accounts of the chapter
- Reports on the chapter's financials
- Ensures membership numbers are maintained (In January and July, the Secretary-Treasurer receives a comprehensive membership report. To remain active and to receive funding, all chapters must maintain a minimum of 10 members at all times.)
- Can preside over the meeting in the President's absence
- Can be female or male
- Must be a member in good standing of Royal Neighbors

##### **Event Planner:**

- Appointed by the President
- Assists the President in organizing the monthly meetings
- Plans out the chapter's calendar of events
- Can preside over the meeting in the President's absence
- Can be female or male
- Must be a member in good standing of Royal Neighbors

**Social Media Coordinator:**

- Appointed by the President
- Administers the Chapter's Royal Neighbors Facebook Page created by Royal Neighbors
- Takes pictures at chapter community service projects and events
- Posts pictures and promotes chapter events on their Chapter's Facebook Page
- Gets quotes from attendees and members at community service projects and events
- Collects signed Photographic and Personal Statement Releases as needed from members and attendees
- Can be female or male
- Must be a member in good standing of Royal Neighbors
- Not a required chapter leader position, but it is highly suggested

**Youth chapter leadership team includes:**

**Youth Director:**

- Appointed by the President of the affiliated adult chapter or the Home Office
- Leads the youth chapter meetings
- Can be female or male
- Must be a member in good standing of Royal Neighbors
- The Home Office will complete a background check
- Works with Assistant Youth Director to organize chapter meetings and activities

**Assistant Youth Director:**

- Appointed by the President of the affiliated adult chapter or the Home Office
  - If not appointed, the Youth Director may appoint
- Assists the Youth Director in organizing the regular meetings, events and community service projects
- Can preside over the meeting in the Youth Director's absence
- Can be female or male
- Must be a member in good standing of Royal Neighbors
- The Home Office will complete a background check

**Electing Officers**

Chapters hold an annual business meeting each February. It is during this meeting that new officers are elected and installed. Here are simple steps to elect and install officers:

**Electing officers:**

- The President and Secretary-Treasurer are elected at the annual business meeting in February
- The current President is the judge of the election
- All chapter members in good standing are entitled to vote

**How to elect officers:**

- It is recommended to form a Nominating Committee to identify and encourage qualified candidates to run for office
- Look for members who have demonstrated leadership abilities
- Ask the membership as a whole for nominations
- Distribute paper ballots to all members present at the election
- The Nominating Committee introduces the names of the candidates for each officer position and the President asks if there are any additional nominations from the floor
  - If only one person is nominated for a position, the President should request members by acclamation to allow the Secretary-Treasurer to cast a unanimous vote for the position
  - If there is more than one nominee, the President should read all the nominees for the position
  - If only two candidates are nominated, the one with the majority of votes wins
  - If three or more candidates are running for one position, the one having the fewest votes after each ballot should be dropped; this process continues until two candidates remain
  - In case of a tie on the final vote, another ballot should be taken
  - If this ballot also results in a tie, then another method predetermined by the chapter should be used
- The Secretary-Treasurer should collect all ballots, count the votes and report results to the membership

**Installing officers:**

- Officers can be installed during the Election of Officers meeting or at any regular or special meeting following the election
- Appointed officers' terms begin upon appointment
- Any member of the chapter can be chosen by a majority vote of the chapter to act as the Installing Officer
- Any member elected to the leadership team who cannot attend the installation can be installed by proxy or at the next regular or special meeting

**How to install officers:**

- The President should turn the meeting over to the Installing Officer for the installation ceremony
- The Installing Officer asks the President to read the names of the leadership team
- As each officer's name is read, she/he should rise and stand before the Installing Officer
- The Installing Officer asks *"Do you, the newly elected officers, accept the office to which you have been elected/appointed and do you agree to serve as such to the best of your knowledge and ability and to comply with all the requirements of your office as specified by the Society?"* If the officers agree, they should answer *"I do."*
- The Installing Officer then states the following: *"The officers of Royal Neighbors of America Chapter \_\_\_\_\_ for the ensuing term have been duly installed. I wish for them a successful administration and trust that you, one and all, will loyally assist them by your counsel and*

*presence in this, their labor of love and may all who meet with them here strive to work hand-in-hand for the good of our Society. I will now surrender the chair to the Past President.”*

- The Past President adjourns the meeting

## Running a Successful Chapter

### Chapter Meetings

Holding regular meetings is an important part of keeping your chapter active and involved. Chapters should meet at least once a month for a meeting, event or community service project. To earn funding, it is a requirement for chapters to hold at least one meeting each quarter.

#### **Business Meetings:**

- Consist of two or more chapter members
- Begin with the Pledge of Allegiance, prayer or discussion of Royal Neighbors’ mission statement
- Share chapter financials

#### **Annual business meeting:**

- Get-together to elect chapter officers for the ensuing term
- Held in February
- Share chapter financials, membership and contact information
- Set chapter meeting schedule
- Installation of Officers can take place at this time or at any regular or special meeting following the election

#### **Special meeting:**

- Gathering called by the President or requested by five or more members
- Call for meeting should fully state its objectives and no other business can be transacted
- Chapter leadership, with assistance from the Home Office, must notify every chapter member of the meeting and its objectives

### Community Service Projects

Community service projects are an integral part of all chapters. They are defined as any act of community volunteer service performed by two or more members of your chapter in the name of Royal Neighbors. Chapters are encouraged to support projects that align with Royal Neighbors’ vision to protect women financially and empower them to improve their lives, families and communities. Service project ideas as well as financial support are provided to help you make a larger impact.

### Matching Funds Projects:

- Prior to committing to a fund-raiser, complete a Matching Funds request online and await approval from the Home Office.
  - To be eligible to request a matching funds grant, your chapter must reach \$600 level funding for at least one quarter of the current year. First quarter matching funds eligibility is based on whether you reached \$600 level funding during the fourth quarter of the previous year.
  - If you have met the funding requirement, your Member Engagement Specialist will provide you an access code that you will need to unlock your Matching Funds Request.
  - To access the [Matching Funds Request](#), you will need to log in to the online application system which you can get to through the Chapter Leader area of the Royal Neighbors website.
    - If you have logged in to apply for matching funds or any other grant in the past, use the same login and password to sign in.
    - If you do not remember your login credentials, please reach out to a Philanthropy team member at [philanthropy@royalneighbors.org](mailto:philanthropy@royalneighbors.org) or at (309) 732-8337.
    - If you are logging into the system for the first time you will need to create a new account.
- Royal Neighbors will match up to a maximum of \$1,000 of net funds raised by the chapter each year for approved projects.
- The fund-raiser(s) must be for the benefit of an individual, family, not-for-profit organization, service agency, institution or community.
- Funds must be raised by the chapter at a chapter fund-raiser; co-sponsored projects are permitted.
- The Society will accept no financial responsibility for a matching funds project and will not match funds raised until the proper form has been sent to the Home Office.
- Matching funds projects count as a community service project, which helps the chapter work toward earning funding; be sure to include this project on your online report.
- To receive funding:
  - Once your project is finished, complete the [Matching Funds Report](#) online.
  - Include a check from the chapter checking account (payable to Royal Neighbors of America) for the net project funds raised. Along with your check, please include a note with your chapter number and state that the check is for your matching funds project.
  - Chapter funds cannot be donated to increase the match amount.
  - The Home Office will send a check made payable to the project recipient to the chapter leader who completed the report online.

## Event Planning Tips

Every successful project/event starts with good planning and, of course, good people willing to help others. We hope you find this checklist helpful.

- Choose a committee
  - Designate a project leader, who in turn will select a group of people who can help recruit volunteers.
  - Determine who will be the main project coordinator and contact person.
- Choose a project/event
  - Chapters are encouraged to host events/community service projects that align with Royal Neighbors' vision to protect women financially and empower them to improve their lives, families and communities.
  - Agree upon your cause.
  - Determine if the chapter should partner with another group/chapter.
  - Determine if a speaker needs to be contacted.
  - Choose location, date(s) and time(s).
- Spread the word
  - Contact the media in advance and distribute press releases.
  - Post flyers and signs on church bulletin boards, community boards and in local businesses.
  - Invite local VIPs to help: the mayor or local, state or federal legislators.
  - Send postcards to members, friends and family.
  - Recruit volunteers.
  - Review the "Promoting Royal Neighbors and Your Chapter" section of this guide.
- Plan a kick-off
  - Consider organizing a kick-off for your event.
  - Kick-offs raise awareness for your cause and inspire more volunteers.
  - Invite the media, dignitaries and VIPs.
  - Invite a local TV personality to serve as emcee.
  - Recognize the volunteers.
- Finalize the details
  - Define specific tasks, time requirements and deadlines.
    - What exactly will volunteers do?
    - How many volunteers will be needed for each task?
    - Who is taking pictures at the event?
    - Who is responsible for collecting signed waivers and release forms?
    - Who will do the prep work and when?
    - Who will clean up and when?
  - Determine the locations, supplies needed and transportation.
    - What materials are needed to complete the project?
    - Who is supplying the materials?
    - How will the materials be paid for or are they donated?
    - Where will the materials be housed?
  - Refreshments

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- Provided free of charge or provided for a cash donation?
  - Match volunteers' skills to tasks.
  - Arrange for the Social Media Coordinator or a photographer to document the activities if your chapter has one.
  - Develop a short information session for volunteers—handouts are very effective.
  - Display current Royal Neighbors signs, banners and brochures.
- Handle logistics
  - Think ahead, provide information and plan for emergencies.
  - Get directions, provide maps to the site.
  - Is there a first-aid kit on site?
  - Where is the nearest hospital/medical center?
  - What will volunteers do if it rains?
  - Where are the closest restrooms?
  - Where can volunteers eat; provided or need to bring their own?
  - Will beverages/water be available?
- Don't forget a few essentials
  - Have all the supplies available before the beginning of the event.
  - Have enough work for all volunteers.
  - Give volunteers clear instructions.
  - Alert local media and public officials to plans.
  - Plan a recognition event for the volunteers.
  - Ask volunteers to sign a photo release form.
  - Evaluate the project - does its success warrant a larger project?
- Prepare for the unexpected
  - Give careful attention to preventing injury or harm and to issues such as liability, insurance, medical treatment authorization and assumption of risk.
  - Watch for hazards, be observant and intercede when necessary.
  - Suggest volunteers wear sturdy shoes.
  - Provide masks if working with dangerous fumes or excessive dust.
  - Complete a Waiver of Liability form (available online).
- Have fun
  - After careful planning, your project is sure to be a success.
  - Enjoy the day and take pride in your accomplishments.
  - It is leaders like you who make the world a better place.
  - Recognize and thank your volunteers.

## Chapter Funding and Incentives

### Quarterly Funding Levels

**The volunteer hours requirements are:**

\$600/Q – 1 chapter meeting and 150 volunteer hours per quarter

\$400/Q – 1 chapter meeting and 120 volunteer hours per quarter

\$200/Q – 1 chapter meeting and 60 volunteer hours per quarter

*All volunteer hours and chapter meetings must be recorded on the Quarterly Report through the [online reporting tool](#) to be considered for funding. Your chapter must submit a report of volunteer activity within **5 days** after the quarter. Please report your hours accurately and reach out to your Member Engagement Specialist if you have questions about completing your report.*

All funding is deposited directly to the chapter's account via Electronic Funds Transfer. It is important that you notify your Member Engagement Specialist of any bank account changes. Or, if you need forms to change officers and signors at the bank.

### Individual Member Volunteer Hours

- a. Chapter members may report some of their individual volunteer hours as a way to meet quarterly funding requirements. Specific guidelines state which kinds of volunteer activities can be reported to count for chapter funding requirements. We are looking for volunteerism that has a broad community impact.
- b. Chapter members can report hours they contribute to the following types of volunteer activities:
  - Educational support: helping at schools, reading programs, tutoring, etc.
  - Hunger and homelessness relief: food pantry, meal sites, clothing collections, etc.
  - Youth related: mentoring programs, youth shelters, etc.
  - Health related: hospice, driving veterans to appointments, cancer support groups, etc.
  - Civic activities: library volunteerism, police and fire departments, animal shelters, etc.
- c. There are no requirements for members to report their individual hours. It is only an option to help chapters reach funding goals. If you are reporting individual hours to help reach your quarterly funding goal, **50%** of your hours must be chapter hours.
- d. Chapter leaders must report these individual hours on behalf of their members through the online reporting tool. [Instructions](#) are posted on the website under "Guidelines for Chapter – Volunteer Hours."

### Annual Incentives

Chapter incentive is used to reward chapters that record the most volunteer hours for the year and to encourage chapters to utilize our programs to the fullest. Chapters may use the contest winnings to complete additional community service projects or to make a grant to a non-profit or charitable cause.

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- a. Quarterly Contests:
  - Contests will be announced throughout the year for each quarter. The announcement will be made on the Chapter Leaders Facebook group.
- b. Amounts Awarded:
  - Top 10 chapters in volunteer hours win \$1,000 each
  - Next 20 chapters in volunteer hours win \$500 each
  - Next 30 chapters in volunteer hours win \$250 each

## Promoting Royal Neighbors and Your Chapter

### Social Media

Royal Neighbors recognizes the benefits of utilizing social media to help chapters interact with members, share information and invite members to events. Upon request, Royal Neighbors will provide each of its chapters a Facebook page to promote its activities. In order to manage and control information about the Royal Neighbors identity and activities, chapters and individual chapter members may not create or use any other social media outlets to discuss Royal Neighbors or any of its activities, including, but not limited to, personal Facebook, Pinterest, Twitter accounts, etc. If you need access to your page or want to create your own, please contact a Philanthropy team member at (309) 732-8337.

### Tips for Social Media

Examples of appropriate posts include:

- Chapter leadership introductions (name, role, short biography, etc.); make sure you get permission before adding their names
- Meeting announcements
- Creating an event and posting it to your chapter page
- Chapter activities and how to get involved
- Volunteer recognition
- New member recruiting

Royal Neighbors reserves the right to monitor and control content on the chapter Facebook page. All postings must comply with applicable copyright and intellectual property laws and be either original material from the person posting the material or have the permission of the author or owner of the material before posting.

### Signage

Displaying Royal Neighbors signage at your events is a great way to build awareness for Royal Neighbors and your chapter. Each chapter should have received laminated signage for their activities. If your chapter currently has old logoed signage or wishes to order additional signs, please contact your Member Engagement Specialist.

## Chapter Leader Communications and Support

### Facebook Group

The Royal Neighbors Chapter Leaders Facebook Group will be your resource for everything you need to know about successfully leading your chapter. It will be your primary source for program updates, deadlines, chapter accomplishments and important dates. The Facebook Group is a collaborative environment that encourages the sharing of project ideas and discussions among chapter leaders. Reach out to your Member Engagement Specialist to join the group today!

### Chapter Leader Email Addresses

Email is the primary method of contact between you and your Member Engagement Specialist. It is strongly recommended that all chapter leaders provide an email address to Royal Neighbors so that we can communicate with you efficiently and help you better serve your chapter. Please contact your Member Engagement Specialist, Darcy Smith at [Darcy.Smith@royalneighbors.org](mailto:Darcy.Smith@royalneighbors.org) or Vickie Sedam at [Vickie.Sedam@royalneighbors.org](mailto:Vickie.Sedam@royalneighbors.org) to share your email address with Royal Neighbors today!

### Online Reporting Manual

The [Online Reporting Manual](#), which can be found on the Chapter Leaders area of the website under “Volunteer Hour Manual,” takes you step-by-step through the quarterly reporting process using screenshots to guide you visually.

## Membership

As a member of Royal Neighbors, you are a member of a fraternal benefit society. Fraternal benefit societies are membership-based organizations that are centered on three great traditions. First, individuals voluntarily join together based upon a common bond. Second, they organize themselves with their fellow members through a network of local organizations called chapters. And, third, there is a strong commitment to mutual support of the members and service to communities.

### Types of Membership

Royal Neighbors of America offers two types of membership: beneficial and general.

**Beneficial members:** Beneficial members are insured by Royal Neighbors or are the owners of an annuity or settlement contract with Royal Neighbors, who is not currently on Extended Term Insurance. There is no additional membership fee.

**General members:** General members are 15 years or older who apply for membership and pay an annual membership fee of \$20. Anyone holding a general membership who has not reached the age of 15 is considered a youth general member.

As a member of a fraternal benefit society, you have access to many member savings and philanthropy programs. Currently, Royal Neighbors’ savings include discounts on prescription drugs, dental and vision care, hearing services, labs and imaging services, preventative health screenings, legal services and retail benefits.

Member Relief Fund and eligibility for scholarships are exclusive to beneficial members only.

The chart on the next page depicts the benefits available for each type of membership.

Opportunity	General Member	Beneficial Member
Difference Maker Fund	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Nation of Neighbors <sup>SM</sup> Grant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Free and Discounted Services	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Volunteer Opportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Educational Scholarships		<input checked="" type="checkbox"/>
Member Relief Fund		<input checked="" type="checkbox"/>
Voting Privileges		<input checked="" type="checkbox"/>

### Member Savings

Holding membership with Royal Neighbors of America provides members and their families the opportunity to save money with valuable discounts. Please visit the [Member Savings](#) page of the Royal Neighbors website for a detailed list of all the savings offered.

### Philanthropy Programs

#### Member Relief Fund

Royal Neighbors recognizes that serious illness or disaster can strike anyone at any time. In the true meaning of fraternalism, the Society may provide financial assistance from the Member Relief Fund to both adult and youth beneficial members.

The Member Relief Fund may be considered for beneficial members experiencing extreme financial hardship as a result of illness, personal injury or natural disaster.

Funding is available annually to assist with the payment of Royal Neighbors premiums or direct financial need, until the annual fund is exhausted.

If you have incurred an illness, personal injury or disaster hardship, please visit the [Member Relief Fund](#) page of the Royal Neighbors website for more information or to apply. To qualify for aid, you must apply within six months of the occurrence.

### ***The Royal Neighbor Magazine***

Royal Neighbors publishes an [online membership magazine](#) each quarter. In each issue you'll find:

- Updates on Royal Neighbors' scholarship programs and other member savings
- Informative articles to help you stay healthy, both physically and financially
- A message from the President/CEO, special features and more

### **Nation of Neighbors<sup>SM</sup> Program**

- The Nation of Neighbors Program provides financial assistance to individuals who have a plan to start or expand a business, organization or group that helps women and/or girls in their community. More than \$2 million has been awarded to grant recipients since the program began in 2007.
- Nation of Neighbors recipients must be nominated by a Royal Neighbors member, but nominees do not have to be a member to receive the grant. For more information about how to nominate an outstanding individual, visit the [Nation of Neighbors](#) page of our website. Nominations are accepted annually between March 1 and June 15.

### Scholarship Program

Royal Neighbors of America encourages its members to continue their education to reach their personal and professional goals. Since 1961, we have offered scholarships to our beneficial members – those who are insured and/or own an annuity with Royal Neighbors. A wide range of scholarships are offered. Call (800) 627-4762 or visit our Royal Neighbors [Scholarships](#) page for more information. Applications are accepted annually from September 1 to March 1.

The chart below provides more detail on the types of scholarships available to beneficial members.

Scholarship	Who Is Eligible	Use of Funds	Renewable	Annual Scholarship Amount	Potential Maximum Grant
Making a Difference	Graduating High School Seniors	Degree at accredited college or university	<input checked="" type="checkbox"/>	\$2,000	\$8,000
Making a Difference Leader	Graduating High School Female Seniors	Degree at accredited college or university	<input checked="" type="checkbox"/>	\$5,000	\$20,000
New Horizons	Ages 18+ High School Graduates	Degree at accredited college or university		\$5,000	\$5,000
New Horizons Leader	Ages 18+ High School Graduates	Degree at accredited college or university	<input checked="" type="checkbox"/>	\$5,000	\$20,000
Life Enrichment	Ages 18+ High School Graduates	Short-term courses for semi-professional occupations in business/industry or programs to provide skilled training		\$500	\$500

### Voting Privileges

The Royal Neighbors of America Board of Directors consists of between 7 to 11 members, all but 2 of whom are outside directors elected by the entire adult beneficial membership of the organization. The two inside directors are approved by the Board. The adult beneficial members have the opportunity to

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have a direct voice in the governance of the organization through this election process by completing and returning the mail-in or email ballot each June.

Your Philanthropy Team

### Contacts

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