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NEW SOROPTIMIST CLUB PROCESS

For the purpose of this document, references to SIGBI Limited and Soroptimist International will be written as "SIGBI" and "SI" only.

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1 Introduction

This guide is intended for anyone thinking of starting a new Soroptimist Club. It takes you through some of the questions and processes that you need to consider.

It is recognised that the possibility of a new Club can come about in many ways. Every Region, National Association, Network and Country will be proactive in regularly reviewing their area for locations, which could possibly support a new Club. SIGBI HQ Office is also being approached by members and also by groups of friends/colleagues who are interested in establishing a new Club. Additionally, sometimes an existing Club is large enough to consider splitting it into two Clubs or there may be sufficient demand in an area for a second Club to be started.

If a large group of members from one Club decide to form a new Club, then the Region/NA/Network/Country Membership and Development Officers should work with both the Club members staying with the original Club and the members creating the new Club to ensure that there is no conflict of interest (e.g. Programme Work/partners/recruitment catchment area) or any unresolved underlying issues that may cause conflict. The Region/NA/Network/Country Development and Membership Officers should address and resolve any issues before it is agreed that the new Club can go ahead. If necessary, the Dispute Resolution Procedure can be used to resolve any issues. It is important that both Clubs can work in friendship going forward.

The main factor is commitment to lead everyone through the process from the start through to finish and all criteria is met to allow the new Club to be chartered. This leader may be a member who is not one of the existing Region/NA/ Network/Country Officers at that time. If this is the case, she must involve those Officers and work closely with them as they will support her in the process and welcome the new Club into the Region/NA/Network/Country.

2 Getting Started

2.1 Identify a geographical area for a new Club and possible new members.

- Is there an existing Club or was there a Club many years ago?
- What is the size of the population?
- What activities is the local population engaged with in the area?
- Are there local project possibilities and benefits for the area?
- What other groups of women exist that might be interested in Soroptimism?
- Assess the possible impact on surrounding Clubs (involve the Region, National Association, Network, Country Officers).
- Note: In the UK, census and local authority data can be obtained to help you with the assessment of an area. In developing countries where census and local authority data is unavailable, member's local knowledge will be accepted.
- Note: In Countries with one or more Clubs, but without a National Association, Network/Country or Regions, the Country's Federation Councillor must be informed about

Note: Care should be taken to not affect the survival of any existing Club, liaising with the Region/NA/Network/Country is vital to ensure this.

2.2 Prospective Members

Create a list of potential members. They could come from:

- Recommendations from members of existing Clubs.
- Business and professional women in local companies and public sector organisations.
- Local professional and trade publications/directories.
- Local Chamber of Commerce List of Members.
- Yellow Pages.
- Local Newspapers (new firms, women executives, community leaders).
- Facebook Advertising/Use of social media.

2.3 A Group Of Women Who Wish To Start A Club

It could be that an outside group of women, who may have common interests such as a hobby or a profession, contact the SIGBI HQ office wishing to start a new Soroptimist Club rather than the normal route of starting with an idea from a Club or Region/NA/Network/Country. In this circumstance the group would be referred by SIGBI HQ office to the Region/NA/Network/Country Development and Membership Officer and Federation Councillor and the New Club Process followed.

2.4 Liaising With SIGBI HQ

- If the outcome of the research is positive, contact SIGBI HQ Office, who will obtain approval from the Director to continue with your plans to start a new Club.
- SIGBI HQ Office will:
 - Supply a range of useful documents
 - Advise on funding opportunities
 - Allocate a liaison person to support the initiative.
- Ensure SIGBI HQ Office, Region/NA/Network/Country Development and Membership Officer and your Federation Councillor are kept fully informed at all stages of the project. The officers and SIGBI HQ office need to receive Minutes/Notes of each meeting as soon as they are produced – this will give us information about how many prospective members are attending each meeting and any project work that the Club is organising. The Region/NA/Network/Country and SIGBI HQ Office will work together to ensure that the minutes are evaluated to gauge whether the Club is operating in line with SIGBI values and the Code of Conduct. SIGBI HQ Office should also be informed of any specific developments, e.g. that Officers have been elected, and a bank account has been opened.
- In New Countries, the SIGBI HQ Office will lead the procedure with the Director of Membership and will co-opt experienced members to assist as appropriate. It is important to fulfill any government requirements, which there may be in order for a Soroptimist International Club to be opened in that country.

2.5 Region/NA/Network/Country Project Team To Manage The New Club Process

Once a geographical area has been identified, the Region/NA/Network/Country Officers will appoint a sponsor Club who will support the new Club.

The Sponsor Club will preferably be close to the location of the prospective Club, but it is more important that the members possess the necessary attributes to nurture the new Club.

The role of the Sponsor Club is to provide informal support, friendship and mentoring and financial accounting expertise.

Set up a Project Team who will manage the new Club process. This should include the Region/NA/Network/Country Development and Membership Officers, two members of the Sponsor Club and two members of the potential Club, plus any other members as decided by the Region/NA/Network/Country Executive.

Minutes of meetings of the Project Team should be sent to the Federation Councillor, the Region/NA/Network/Country Executive and Federation Office.

Use should be made of modern technology, e.g. Skype/Facetime, to ensure that meetings of the Team can be held regularly. These meetings are to ensure all members of the Team are kept involved in the progress of the 'Potential New Club', and aware of any issues that need to be resolved.

Potential members of the new Club may become Associate Members of SIGBI if they wish until the new Club is chartered.

Before signing the petition for the Club, ensure that all its members have read and understood the Members' Code of Conduct (Appendix 1). In addition, the potential members and the Region/NA/Network/Country Officers have collaborated in completing the Club Health Check (Appendix 2).

Note:

As the proposed Club progresses, it is important that the team and Club communicates regularly with the Region/NA/Network/Country Executive and Federation Councillor and supports the 'Potential New Club's integration into the Region/NA/Network/Country as it progresses towards chartering.

Any issues need to be identified and resolved before the petition is signed.

To support this, the following is best practice....

- ***Exchange of contact details between proposed Club and Region/NA/Network/Country from the outset.***
- ***A minimum of 3 meetings are to be held between the members of the potential club and the Region/NA/Network/Country Executive committee members leading up to the signing of the petition.***

2.6 Organisational Development (Extension) Grant

- The Federation has some organisational development funds available from which grants can be made.
- There are examples of a Development Plan and Budget on the website. The application form is located on the website. All can be found on Soroptimist International of Great Britain & Ireland Members > Clubs > Starting a New Club.

- The application form is completed and submitted, along with a Development Plan and a Budget, detailing the proposed expenditure to be covered by the grant from SIGBI. The Region/NA/Network/Country pay half the costs and SIGBI the other half.

Note: Funds are administered by the Director of Membership and can only be claimed in retrospect and on provision of receipts.

The application form needs to be submitted for approval in advance of any expenditure. Note that there might be some expenditure involved at the early stages, which might not be refunded if the new Club does not progress.

2.7 Development Plan

Once the target area is determined, the Project Team will:

- Write a development plan.
- Develop a timetable that shows the actions needed from the initial work to identify potential members through to chartering the new Club, and indicate who will be responsible for each stage and task in the plan.
- Confirm when informational meetings will be held to attract potential members - especially the initial meeting.
- Decide how to identify interested women and when invitation letters will be mailed.
- Select a suitable meeting venue/s.
- Contact press and media in the area.
- Develop a social programme or events.
- Develop a realistic budget by estimating the costs for materials, meetings, postage, travel and telephone expenses.
- Establish a website and social media platform for the planned Club; funding can be as part of costs covered in the Development grant.

2.8 Sample Development Plan

OBJECTIVE	METHOD	OFFICER	START DATE DD/MM/YY	END DATE DD/MM/YY	COMMENTS
To appoint a Project Team	Selected by Region/NA/Network/Country Executive, Sponsor Club and Potential Club	Regional/NA/Network/Country Membership Officer			
To recruit a minimum of 12 members	Word of Mouth Advertising, Open Membership Evening, Personal Invitation	Regional/NA/Network/Country Membership Officer			State how many committed core members to date
To set out detailed information on SI	Members to be given information on how to access material on website	Regional/NA/Network/Country Membership Officer			
To appoint Club Officers.	Prospective members of new Club to elect the Club Officers	Region/NA/Network/Country Membership Officer			

Club Treasurer to set up a Bank Account and books of account	Open Account in the name of the new Club with the word 'potential' in it. 3 Signatories. Region/NA/Network/Country and Sponsor Club Treasurers to advise.	Region/NA/Network/Country Membership Officer, Treasurer and Club Treasurer.			Once Account opened, Treasurer to set up accounts and report monthly on a verbal basis and in writing quarterly.
To Develop Training and Development Programme for Club	Project Team in consultation with potential Club members	Region/NA/Network/Country Membership Officer			Identify training and development needs for Club members. Complete the Club Health check
To identify and set up 2 PA Projects, local and international	Potential Club PA Officer to liaise with Regional and Sponsor Club PA Officers	Region/NA/Network/Country Membership and PA Officers			
To create a social programme	Potential Club Members liaising with the Project Team				
To monitor, review report to Region/NA/Network and Federation	Quarterly meetings and reports	Project Team			Petition one year from start date and charter within twelve to eighteen months

3 Make it Happen

3.1 Initial Meeting

- The goal of the initial meeting is to generate excitement and enthusiasm among prospective members about Soroptimist International, focusing on the ways Soroptimists can improve the lives of women and girls through local Club projects, national and international programmes and our relationship with the United Nations.
- You also need to point out that the new Club would be part of an international Network/Country of Clubs who all face the same challenges of balancing career and family along with volunteering.
- Give a clear explanation of the Vision and Mission of Soroptimist International. Promote the benefits. Explain the responsibilities and the cost of membership and generate a desire amongst those present to join.
- Show them the structure of Soroptimist International.
- Ask the Region/NA/Network/Country or sponsoring Club to chair the meeting. Make it short and focused and no more than an hour and a half in length. A clear agreed agenda must be followed and remember that the overall goal is to excite and enthuse the attendees.
- Remember to hand out Soroptimist literature for interested women to take away with them, and include the relevant contact details.
- A localised Facebook advertisement could be created and run over, for example, a weekend.
- Identify key people who seem excited about the new Club and whose energy and enthusiasm is contagious. These women will help spread the news of the new Club.
- Ask those present if they know of others who might be interested in joining the new Club and collect these names and addresses/telephone numbers/email addresses so that invitations can be sent to them for the next meeting.
- Following the agreed meetings, assess whether there is a viable opportunity for a new Club and update the development plan if necessary.
- Potential members should be invited to attend in a personally addressed letter/email with a follow up reminder phone call just before the meeting, if possible.

3.2 Agenda

The Agenda for the second meeting should include the following:

- Sign in and Welcome.
- The Mission and Vision of Soroptimist International.
- Soroptimist International as an International Organisation.
- The structure and status with the United Nations.
- Soroptimist Clubs: a brief summary of how they function, showing examples of the variety of Clubs.
- Programme Action – some examples of how members carry out this work.
- The responsibilities of Soroptimist membership including financial and time commitments.
- The role of the Federation and the Region/National Association/ Network/ Country.
- Highlight the opportunity to make new friends and possibly to being able to attend other Clubs' meetings.
- Friendship Links.

- Make sure there is plenty of time for questions.
- Agree a date and time for the next meeting to be held within one month, with two further meeting dates agreed by those present.

3.3 Follow-up

After the initial meeting, the extension team will:

- Assess whether there is a viable opportunity for extension and update the development plan.
- Contact the prospective members by telephone, email or personal note to reinforce the connection.
- Create a file of the names and addresses of prospective members who are unable to make the initial commitment.
- Plan to make follow-up telephone calls and include them on the mailing list of the future Club.
- Start a simple prospective Club newsletter, if possible, and use it along with invitations and personal contacts to describe prospective activities.

Note: You need to be really motivated and determined - it helps if you have three or four people who share your enthusiasm!

3.4 Development Process

Once the decision has been taken to continue with the new Club, it is time to move to the next phase of holding regular meetings, and agreeing the Development Plan with the 'founder members'. This will include:

Programme Action

- Explain and engage them about the Programme Action goals and the link to the UN Sustainable Development Goals (SDG's).
- Identify and encourage involvement with local and international projects in line with current Programme Action objectives.
- Give guidance on the selection of suitable Programme Action projects both locally, nationally and internationally, based on the current Programme Action objectives.
- Form a Programme Action sub-committee at an appropriate stage, and they can identify a small number of well-run achievable projects.

Building a Sustainable Club

- Explain the importance of social events to get the Club Members to know each other and form strong relationships.
- Stress that it does not matter how long it takes for the Club to be chartered. It is more important to ensure that Members know what is involved, and are able to support each other on a personal level and with Programme Action activities.

Structure of Soroptimist International

- Explain the structure, management and functioning of Soroptimist International, the Federation, Region, National Association or Network/Country and the Clubs, as determined by our International and Federation articles and Club and Region/NA/Network/Country Constitutions.
- Encourage potential members to attend meetings of other Clubs and of the Region, National Association or Network/Country Club Management.
- Appoint members to take lead roles in the formation of the Club, e.g. President, Programme Action Officer, Treasurer, Secretary and sign post the roles and responsibilities documents on the website.
- Explain the petition and charter process and the financial implications of the event i.e. chartering expenses are not covered by the grant?
- Give Guidance on the setting of a budget, the subscription fee and establishing bank accounts. A bank account must be opened once it is clear that the new Club is to proceed
- Three signatories will be required. All cheques must be signed by any two of these three signatories.
- Expenditure must be authorized by more than 1 person, whether this is through electronic transfers or by signing of cheques.

Tip: Getting prospective members to another Club's meetings, and/or a Region, National Association or Network/Country Meeting helps them to understand Soroptimism more quickly and settle into the organisation

Care: Members of the potential Club must not imply that they are members of Soroptimist International until the Club has been chartered and their membership confirmed

They can become Associate Members

The Club can be referred to as the 'Proposed SI Club '

Note: It is important to record attendance and Notes/ Minutes of all meetings, as these will be needed when the petition is submitted, together with evidence of Programme Action work

Review of Progress

- The Region, National Association or Network/Country Officers will be responsible for reviewing the progress of the potential Club, offering guidance to ensure that meetings are correctly recorded, financial records maintained, and that there is an understanding of, and compliance with Federation governing documents.
- Reports are also forwarded to the SIGBI HQ Office.
- If possible, hold an Open Meeting before the charter to enable the Clubs in the Region/NA/Network/Country and the new Club to get to know each other.

4 Join SIGBI

4.1 Petition

- When the Region, National Association or Network/Country Officers are confident that the new Club is ready to be Chartered (at least 8 members must have been recruited and attended meetings regularly), a Petition must be completed and presented to the SIGBI HQ Office. You can obtain the petition forms from the Office.
- Complete the forms and return them to the SIGBI HQ Office along with Minutes/Notes to show that the Club has been meeting regularly and there is evidence of established, appropriate Programme Action work.
- Agree a provisional date for the Charter Ceremony and include it on the petition.

Tip: 8 are the minimum number of members required. However, it is always best to exceed this number given that some individuals may “drop-out” before the charter event takes place.

4.2 Getting The Petition Approved

- The Director of Membership will hold a meeting with the Region/NA/Network/Country Officer/s and the Federation Councillor to agree the petition meets all the criteria required. It will then be approved or returned with the information as to what is missing and what has to happen before re-submitting the petition.
- Capitation Fees are due immediately before the charter ceremony and the Treasurer should contact the SIGBI HQ Office as to the fee rate.

Tip: Please ensure that names are clearly written on the Petition Form - as this is the document that will be used when the SIGBI HQ Office orders the name badges.

4.3 Organising The Charter Ceremony

After approval, it is time to plan the event and celebrate!

- Date.
- Venue.
- Cost.
- Choose a suitable venue.
- Functions vary from a short formal meeting, followed by a reception, to a very formal banquet.
- The choice should be that of the new Club's members.
- Soroptimists and their guests should pay for their own tickets for the event.
- When writing up the budget take into account the cost of tickets for official guests of the Club, including the Chartering Officer. These costs are met from the Club's budget for the event.

Note: Remember to keep the SIGBI HQ Office informed of your plans for the Charter Ceremony. This is crucial if the SIGBI Federation President is to present the Charter

Invitations

- Send out invitations in good time to local and national VIP's, representatives of other Non-Governmental Organisations (e.g. Rotary, Lions), SIGBI Federation, Region, National Association or Network/Country Officers and members of local Soroptimist Clubs.

Publicity

- Contact local/national newspapers, radio and television to alert them to the event and the formation of a new Club.
- Ask the proposed Club PR/Communications Officer to act as liaison with the media.
- The Region/National Association/Network/Country Media Officer could also contact the media in the area.

Note: Remember to include the website addresses of Soroptimist International, SIGBI and the website/email contact details of the new Club in the press release provided for them

Insignia

- It is not essential for a new Club to have a Presidential Chain of Office.

Members' Badges

- The SIGBI HQ Office will provide Founder Members with name badges as part of the Charter Ceremony.

4.4 The Charter Ceremony

- Invite all members of the new Club to attend the Charter Ceremony. There is an expectation that all members of the new club will attend the Charter Ceremony.
- Ask members to greet your VIP's
- Introduce your VIP's to the Federation, Region/NA/Network/Country and Club members attending the event
- The ceremony should include:
 - A welcome by the President of the new Club including a mention of all VIP's
 - Reading of the Vision and Mission of Soroptimist International
 - The presentation of the Charter by the Chartering Officer, on behalf of the Federation, to the President of the new Club
- The Chartering Officer may make a short speech and will then use the following words:
“In the name of the Federation of Great Britain and Ireland, I welcome you to the fellowship of Soroptimist International. I charge you to:
 - ***Maintain high ethical standards***
 - ***Work for human rights and the status of women***
 - ***Encourage friendship between Soroptimists of all countries***
 - ***Give service to the community***
 - ***Promote international understanding and friendship***
- ***“Madam President, I give you the Charter of Soroptimist International of
Enjoy your membership of our great organisation”***

- The Charter is then signed by the founder Club President and the Federation Chartering Officer. The founder members of the Club are then inducted and receive their badges and a 'New Member's Pack' using the following words: *“It is with pleasure that I welcome you as members of Soroptimist International of joining women worldwide who are bound together in service and friendship. I now offer you the right hand of friendship signifying your entry into this Club and linking you with Soroptimists everywhere. We hope that you will find a sense of achievement in your membership of an international service organisation that strives constantly to improve the lives of women and girls.”*
- Each new member shakes hands with the Chartering Officer, who says: *“As Soroptimists, your duties are to maintain high ethical standards, work for human rights and the status of women, encourage friendship between Soroptimists of all countries, give service to the community and promote international understanding and friendship. Sister Soroptimists, I commend to you our new members and ask you to support them in whatever way you can.”*
- A roll call is then taken with the assembled Club members standing in turn to introduce themselves by name. Each new member should sign the Charter sheet to show that she is a founder member.
- The Club President may then make an inaugural speech.
- Greetings received from those unable to attend the event should be read out.
- Soroptimists attending the event may wish to present greetings/gifts from their Clubs, Region, National Association or Network/Country.
- A brief vote of thanks is made on behalf of the new Club by one of its members to include: VIP's, Chartering Officer, Extension and Membership Officer involved with the formation of the Club, sponsoring ('Mother') Club, Region, National Association or Network/Country, other Soroptimists attending and the function/catering staff.

5 Supporting the New Club For The First 'Three Years'

- There is a continuing responsibility by NA/Region/Network/Country and the sponsoring Club to nurture the newly Chartered Club and support its future development.
- Designate a member of the sponsoring Club to contact the new Club regularly.
- Provide guidance for the new Club with Club management, for example:
- The need to make the yearly membership return and pay dues promptly
- To meet regularly and provide an appropriate balanced programme
- Mentor the new Club through Programme Action, helping new members to choose suitable new projects and ensure they complete regular Programme Action Focus reports online.
- Introduce the new Club and its members at region, national association and Network/Country meetings, offering transportation, if feasible
- Foster a strong sense of 'belonging' to our organisation.
- Draw their attention to Conferences and Study Days.
- Remind the members of the new Club that they can attend meetings of other Clubs anywhere in the world.
- To hold reviews on how well the Club is operating and to gain feedback about the members' experience
- The Induction process for new members and the importance of the Code of Conduct to assist us in experiencing fun and friendship from our membership.

Tip: Nurture but do not dominate the new Club. The new Club can do things differently!

APPENDIX 1: Members' Code of Conduct

Explanation:

A code of conduct lays out an organisation's expectations and guiding principles for appropriate behaviour. It can also provide legal and ethical guidelines for members to follow.

Application:

The Code of Conduct applies to all members of the SIGBI organisation. That is members of SIGBI Clubs, Regions, National Associations, Network/Country and Countries and Associate members, as referred to in the SIGBI governing documents and specifically includes those who serve on any SIGBI governing bodies.

The Code:

SIGBI believes that all members should respect one another and work constructively to achieve the objectives of Soroptimist International. We therefore ask that all members of the SIGBI organisation take personal responsibility for their conduct and undertake the following:

- To be a positive ambassador for SIGBI and ensure that you take no action and make no comment that might damage the reputation and interests of the organisation.
- To support the Objects of Soroptimist International and the Vision and Mission of SIGBI.
- To make an active contribution towards improving the lives of women and girls through the work of the organisation.
- To conduct all activities professionally and with integrity, and respect the rights and wellbeing of all individuals.
- To not recklessly or maliciously injure the professional or personal reputation of another member.
- To avoid conflicts of interest or loyalty wherever possible. Full and prior disclosure of any conflict, or potential conflict, must be made to those concerned.
- To understand that no form of harassment or bullying will be tolerated, and that all incidents of unfair or offensive treatment will be reported.
- To be open and honest in all our dealings with members as well as the general public.
- To be tolerant of others' views, beliefs and capabilities as well as their time and energy commitment.
- To work with others to resolve any conflicts that may arise.
- To act within the governing documents of SIGBI (which includes the Articles of Association and Bye-Laws of SIGBI and Club, Region/National Association/Network/Country Constitutions) and abide by the policies and procedures of SIGBI.
- To respect and understand the need for confidentiality when appropriate.
- To take all reasonable steps to conform to relevant law including the health and safety of yourself and others.
- To protect the intellectual property of SIGBI such as the dynamic "S" Logo.
- To value and respect diversity as a source of innovation and skill.
- To have high personal standards by awareness of and adhering to this Code, both in the spirit and in the letter.
- To pay membership fees due to any SIGBI organisation on time.

Any actions that may serve to compromise the integrity of SIGBI will not be condoned or allowed. Any substantial breach of any part of this Code may result in procedures being implemented that may result in termination of membership.

This Code is a statement of the values that all members of the SIGBI organisation will uphold in any activities that are carried out in the name of Soroptimist International of Great Britain & Ireland (SIGBI) Ltd.

References:

SIGBI Articles of Associate and Byelaws

Club, Region/National Associate/Network/Country Constitutions

APPENDIX 2: Club Health Check

Club Details

Club Name:	
Website Address:	

Structure of Club

Number of members:	
Number of Executive:	

Club Officers

Position		Filled
Treasurer*	*These positions are the ones that need to be filled in any type of Club	
Secretary*		
Project/Programme Lead*		
President		
President Elect		
Vice President		
Membership Officer		
Development Officer		
Regional Reps		

Key Strengths of the Club

<i>First Strength</i>	
<i>Second Strength</i>	
<i>Third Strength</i>	

Club Growth Aspirations

Estimated Growth In members in Year One	
Estimated Growth In members Year Two	
Estimated Growth in members Year Three	

Key Planning Documents

Document	In Place Yes / No	Revision Needed Yes / No
3 Year Strategic Plan		
Single Page Plan		
Annual Succession Plan		

Main Areas of Development Needed For Members

Area	How the development needs will be met and by whom and when
1.	
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