

Cosmopolitan.International



**FEDERATION
GOVERNOR MANUAL**

FEDERATION GOVERNOR MANUAL

Created by: Cosmopolitan International Education Committee

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Purpose of this Manual

This manual provides clear, step-by-step guidance for the Federation Governor role within the Cosmopolitan International organization. It is intended to ensure consistency, transparency, and effective governance across all federation activities.

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ROLE OF THE GOVERNOR

Job Title: Federation Governor

Elected/Appt. By: Federation members per Federation Bylaws

Reports to: Board

Term: Two years or such term provided in the Federation Bylaws

Requirements

- Cosmopolitan members in good standing
 - Must have served at least one year as Club President
-

Position Summary

The Federation Governor serves as the chief representative of their respective Federations and holds a voting seat on the CI Board. This dual role ensures regional interests are represented at the International Board level while providing direct leadership and oversight to clubs within each Federation. The Federation Governors work to strengthen member engagement, support club development, promote organizational initiatives, and ensure Federation alignment with the overall mission and strategic goals of the Cosmopolitan International.

Key Responsibilities

Regional Leadership:

- Provide oversight and guidance to all clubs within their respective Federation, fostering leadership development and operational effectiveness.
- Serve as a mentor and resource for club officers, helping them implement programs, comply with policies, and resolve issues.
- Facilitate regular communication with club leaders through meetings, calls, and regional newsletters.
- Plan and lead Federation meetings, Conventions, training opportunities, and social events to build cohesion and engagement.
-

Board Service and Governance:

- Serve as a full voting member of the Board, representing the interests, needs, and perspectives of their Federation.
- Attend all board meetings, retreats, and strategic planning sessions.

- Participate in board committees and contribute to policy development, strategic decisions, and program oversight.
- Report regularly to the Board on regional activities, challenges, achievements, and member feedback.

Communication and Coordination:

- Act as a communication conduit between the Board and clubs, sharing important decisions, updates, and initiatives.
- Promote organization-wide programs, campaigns, and service projects at the Federation level.
- Encourage Federation participation in the International Convention and initiatives.

Compliance and Standards:

- Ensure that all clubs within their respective Federations operate in accordance with the Bylaws and Board Policies of Cosmopolitan International.
- Monitor the timely submission of club reports, dues, and other required documentation.
- Support underperforming clubs with troubleshooting, resources, or intervention when necessary.

When does the term of office begin?

The term of office begins on the last day of the International Convention following your election and ends on the last day of the next International Convention following the end of your federation term.

DEVELOP

A

PLAN

DEVELOP A PLAN FOR YOUR YEAR AS GOVERNOR

Following is a guide which will help you meet your obligations as defined in the key responsibilities. Preparing and executing your plan will provide a foundation for success!’

Establish Definitive Federation Goals.

What goals can you set to capitalize on the strengths or improve the weaknesses of your federation and/or clubs? Do you want to increase membership or build new clubs? How about every club earning a Big “C” Award?

Suggested goals might be:

- Membership – have each Club increase their membership.
- Awards – encourage Clubs to present awards to members as acknowledgement of their hard work. Everyone likes a pat on the back!
- Fundraisers – encourage Clubs to have at least one or two fundraisers during the year.
- Service Projects – encourage Clubs to hold service projects in their communities. This could include Meals-on-Wheels, church clean-up, etc.
- COSMOTopics – encourage all Clubs to submit an article to COSMOTopics.

Start now! List 3-5 goals that are both attainable and realistic.

GOALS:

Do you want a theme for your year as Governor? If so, what is the theme/slogan?

PREPARE YOUR ACCEPTANCE SPEECH. If you want, incorporate your theme/slogan and outline your vision and goals for the Federation for the upcoming year.

BECOME KNOWLEDGABLE

Bylaws

- Be aware and knowledgeable of the Federation & CI Bylaws
 - You should become familiar with CI Bylaws, federation bylaws, and/or constitutions. Clubs should also have bylaws/constitution. Both federation and club bylaws should be in accordance with CI bylaws. The federation and CI bylaws are valuable documents and identify the rules which govern and impact your operations as a federation and as Cosmopolitan International.
 - If your federation does not have bylaws, they should be developed. There are examples of Federation bylaws and/or constitution documents that can be used to help you create one for your federation. If necessary, set up a committee to develop proposed bylaws for federation member approval.

Policies, Procedures & Awards

- Be aware of federation procedure manuals, policies, or awards manuals. Know where to find this information for reference or to help officers or club members in your federation.
- Become familiar with CI resources on the CI website.

Websites

- Become familiar with CI, Federation, and Foundation websites.
- If your federation does not have a website, consider creating one.

FINANCIAL OVERSIGHT

Help Prepare or Confirm The Federation Budget

Is there a federation budget in place? Is it adequate? Will it provide you and your federation with the needed funds? If necessary, restructure an existing budget to meet the needs of your goals OR develop federation financial policies that will meet current or future needs of the federation. Ensure that the budget or an amended budget is approved by your members and/or is in accordance with current federation bylaws or federation policies/guidelines related to Finances.

A well-planned and fiscally prepared Federation will have the greatest opportunity to succeed. If you think your federation should amend the budget, use the adopted budgets for the past five years and current to make a critical evaluation.

- How was the income used?
- Did that income produce a benefit for the Federation and the Clubs?
- Are all Clubs current on their dues?
- Did the Federation lack growth or support due to insufficient budgeting for travel and visitation?
- Could the income have been better spent on formal education/training or forums?
- Who has the responsibility for budget creation? Governors should have direct input.

Near the end of your term, prepare a federation budget with the Governor-Elect and Federation Treasurer for the upcoming federation fiscal year. The budget can then be presented to the federation membership for approval at the annual federation convention.

OFFICER RESPONSIBILITIES

Seamless Transition

Ensure that you have received information or have a discussion with the outgoing Governor about the status of ongoing projects or items that still need to be dealt with. This may impact the committees you require or that are still in place OR perhaps a committee that needs to be set up to deal with an item (i.e. develop a federation website, create bylaws, special federation fundraiser or project still in progress, etc.).

Ensure seamless transition among preceding, current, and succeeding lieutenant governors by knowing the status of any outstanding projects or committee work that the Lt. Governors were involved with and how to proceed.

Establish or Confirm Elected Federation Officer Duties

Most federations, elect their Executive such as the Governor, Governor-Elect, Lt. Governors, Treasurer, Secretary, and Judge Advocate. Normally, the positions are defined in the Federation bylaws. Does your federation have Lt. Governors? If so, are the duties of the Lt. Governors defined in your bylaws? Are areas of responsibility defined for each specific position? OR does the Governor define the responsibilities? Once you know the answer to these questions, you can determine how to move forward.

If there are procedure manuals for the elected officials, ensure the elected members are aware of the manual. If there are no procedure manuals, ensure that the elected officers within your federation know what the expectations are for their positions. It is your responsibility to provide mentorship and guidance and work as a team to meet the needs of your Federation.

COMMITTEES

Establish or Confirm Committees, Chairman for Each, and Volunteers to Recruit

Your specific federation policies and bylaws probably specify the structure of each committee. Consider the importance of each. If necessary, assist with recruitment and appointments of volunteers who will complement both the chairperson and the function. If a special unspecified committee is necessary, make your selections based on an announced goal. Start now to develop your leadership program and players. Identify the committees that are required, the chairperson, and determine who is responsible for recruiting volunteers to assist.

DEVELOP COMMUNICATION PLAN

All of us want and need to know to know what is going on at all levels of our organization. Communication is one of the most important aspects of the Governor role. It is important to have a clear understanding of and a plan for regular communication with federation officers, committees, and club presidents. You are also the liaison between the federation and CI. You sit on the CI Board, so should also communicate to your federation what is happening at the CI level, request input, and/or represent the needs or concerns of your federation at CI meetings.

There are **key documents** that must be relayed to the appropriate individuals.

- Federation Executive – once elected, ensure that the Federation Secretary sends a list of the newly elected officers to CI Headquarters with a request to update ClubRunner accordingly. The list developed could also be sent to your federation officers so that they have a quick reference sheet with contact details (Sample 1 attached).

- Welcome & Introduction Letter & Club Annual Plan Form
 - Send an email or letter to all the clubs within your federation to introduce yourself and your team and incorporate Federation and International goals. Ask them for any information about their club that you would like to have as Governor. Advise them that you would like to visit each club during your term of office and are there any events or dates they would particularly like for you to attend.
 - Remind them that if they have not already filled out the Club Annual Plan form to please do so. It is necessary this be filled out and submitted to you, the International President, and Cosmopolitan International Headquarters. This must be in place for the Club to be eligible for Club Awards at the International level. Information to fill this out can be taken from their budget and goals for the year. The clubs should also ensure that the elected officer information is updated on Club Runner. If they do not know how to do that, advise them to contact Cosmopolitan International for assistance.

Communications With Your Federations Officers and Clubs

Communication may be accomplished through zoom meetings, emails, newsletters, telephone, and personal visits.

Setting Up Regular Meetings

Are you setting up regular Federation Executive meetings? This is a way to ensure that you communicate regularly with your officers and committee chairs. It is an opportunity to relay information about CI activities and developments. It provides officers and committee chairs to keep you up to date on their activities. It also provides a forum to discuss concerns or address problems. You could also use this forum for discussion about special projects or activities or develop strategic long-term plans for the federation.

If you plan to have regular meetings, send a note to your Federation Executive to determine what day of the week is best to meet and a time. Establish the dates for the entire year – monthly, bimonthly, quarterly, or whatever you determine is best for your federation. Send the request to your executive at the beginning of the year. Determine when you will send out the agenda and if necessary, the zoom link. Set the dates on your calendar for sending out the agenda, setting up the zoom link, and the meeting dates.

Some federations also include club presidents as part of their Executive Committee so proceed accordingly.

Setting up Regular Correspondence

Plan to send a monthly newsletter. Set up the template now. Determine the date you would like to send it out each month and record those dates on your calendar.

OR if it works better for you, plan to send regular emails.

Whatever method works for you is fine but decide who, when and how you plan to communicate. If necessary, establish dates, and set those up on your calendar.

Be mindful of content. Write with the assumption that the document will be read, reprinted, or redistributed.

Ensure that you submit articles or have clubs submit articles for CosmoTopics highlighting major events or initiatives.

Set up your distribution lists:

- If you plan to use Club Runner, you can easily set up any kind of distribution list that you want – Federation Officers, Federation Presidents/Secretaries, all Federation club members, newsletter distribution list... the possibilities are endless. With Club Runner a record will be retained of all the correspondence you send; you can go back into a specific email and update & resend. It is easy as the email records for the individuals are pulled from the system, so you do not have to type them up!

- If you are using your own email system, set up the distribution lists that you will need.

Suggestion: set up a binder or electronic file for each club in your federation. You could have their executive contact information, Annual Plan Form, notes regarding your communications with them about their club & any follow-up, Club visit information, etc. Once you have the above in place, you can concentrate on the other aspects of your role as Governor.

CLUB OFFICER TRAINING, SUPPORT & MENTORSHIP

Training

- if your Federation offers Education sessions at the Federation convention you may want to provide a comprehensive Officer Training session. At a minimum, include all Club Presidents and secretaries OR
- consider providing a session via zoom as you can invite all club presidents and secretaries or have separate sessions for the various positions.

Support & Mentorship

- It is important to maintain regular contact with clubs via newsletters or emails.
- If clubs are struggling, let them know you are there to support them. Offer assistance, visit their club. Do they want any specific type of support for which you could help?
- Highlight club or member accomplishments by featuring them in your newsletter or e-mail.
- Provide innovative ideas or resources to clubs as appropriate.
- Encourage award submission, attendance at conventions.
- You are the liaison between CI and the federation, so any relevant information should be relayed to the clubs in a timely manner.
- Collaborate with the Governor-Elect throughout your term so that they are ready to take on the role.

As Governor, you are responsible for compliance and standards as identified below:

- Ensure that all clubs within their respective Federations operate in accordance with the Bylaws and Board Policies of Cosmopolitan International.
- Monitor the timely submission of club reports, dues, and other required documentation.
- Support underperforming clubs with troubleshooting, resources, or intervention when necessary.

Club Awards

A Governor's main responsibility to Club awards will be to motivate Club officers to enter or compete for awards. Included in that motivation is the Governor's best effort to have each Club positioned to be eligible: Does a Club produce a monthly newsletter? Have they submitted a Club article for COSMOTopics? Are their financial accounts in order? Early monitoring of these Big C requirements will enable a Club to be eligible for this highest Club honor. Start now to develop an awards program for Clubs within the Federation.

Federation Convention

Plan your convention early and include the information in all your communications.

- Determine a Federation Convention date and location.
- Communicate with the host Committee Convention Chair on a regular basis.
- After your installation, be prepared to give an acceptance speech.
- Be prepared for your role during the convention. Is it standard practise to have your first meeting at the convention. If so, be prepared with an agenda and other relevant material.

Membership Growth & Retention

As the leader of the Federation:

- Encourage Club Presidents to hold at least one New Member Event per year.
- Promote improved membership retention.
- Distribute supporting membership materials and tools available through International.

Motivation & Encouragement

Governors have two methods by which to motivate and encourage Clubs: visits and written communications. Be the cheerleader for CI, your federation, and federation clubs. Enthusiasm, encouragement, and support become Governors' primary motivational tools.

GOVERNOR VISITS

It is important to visit each club in your federation. Arrange with the President for an Official Governor Visit. Are there special events, fundraisers, anniversaries, or other that they would like you to attend? Plan these visits early. The earlier you visit in your year, the better it is as you know the clubs, meet members, and they have an opportunity to meet and visit with you.

Installations

Often Governors are invited to install new Club officers and/or induct new members. As Governor, be prepared to lead this important ceremony. Develop a personal style of delivery that can be adapted to smaller or larger groups and informal to formal events.

NEW MEMBER INSTALLATIONS

The induction of a new member is an important event.

Prior to the installation:

- Ensure you know the name or names of the members to be inducted and their sponsors.
- Talk to the sponsors and let them know you will be asking them to escort the new member to the front, and you will ask them to introduce the member.
- Check to see if there are any items that are to be presented to the new members. Often it will be the membership kit from CI Headquarters and the lapel pin. The club may also have other items such as a nametag, or club T-shirt, or other.
- Know where the installation is on the agenda or when the club would like to do the installation,

Make the new member induction a special event!

- If you want, you can include a brief history of the club or organization OR the significance of the logo and motto.
- Ask the new member's sponsor to escort them to the front of the room and introduce the new member.
- After the introduction, you could say something like
"It is my honor to meet you. You have decided to become a member of the _____ Cosmopolitan Club. With this decision, comes a responsibility to participate as a member by attending meetings, events, and by participating in all activities of the club to the best of your ability and as your other commitments allow. Are you willing to accept this responsibility? If so, I would like to present you with the new

membership package, and I would ask the sponsor to pin on your lapel pin. As well, we would like to present you with _____(present them with any other items the club has provided).”

- Ask all club members to rise and join the new member in repeating the Cosmopolitan pledge:
 - “I hereby pledge my loyalty and friendship to Cosmopolitans everywhere. I agree to abide by the rules of Cosmopolitan International, the _____ Federation, and the _____ Cosmopolitan Club. I promise to incorporate the aims and objectives of Cosmopolitan International into my daily life, so that I may credit to my club, my community, and Cosmopolitans everywhere.”
- Say, “It is my pleasure to introduce _____ as a new club member of the _____ Cosmopolitan Club. Please give him/her a round of applause. Please come forward, shake hands, and offer congratulations to our newest Cosmopolitan.”

Club & Federation Officers Installations

Club and Federation officers should be formally installed by present or past federation governors or International officers. Lapel pins may be presented to the newly installed officers as well as retiring officers. You might have to only install club officers, or federation board members or you can do both at once by simply altering a few words.

CLUB OFFICER INSTALLATIONS

“It is my pleasure to present the new officers of the _____ Cosmopolitan Club. As I read your names, will the duly elected officers of the _____ Cosmopolitan Club please come forward and stand in a rowing facing me.

You have been elected as the officers of the _____ Cosmopolitan Club. With this honor goes the responsibility of managing the affairs of this club, faithful attendance, sincere interest, and meaningful participation at board meetings are essential. The general welfare and success of your club is your responsibility.

Are you willing to accept the office in the _____ Cosmopolitan Club to which you have been elected, and are you willing to assume the responsibilities thereof?

If so, please raise your right hand and repeat after me.

I accept the office to which I have been elected and its responsibilities. I reaffirm my adherence to the Cosmopolitan principles, and I pledge my honor thereto.”

FEDERATION OFFICER INSTALLATION

“It is my pleasure to present the new Board members of the _____ Federation. As I read your names, will the duly Board members of the _____ Federation please come forward and stand in a rowing facing me.

You have been elected as the Board members of the _____ Federation. With this honor goes the responsibility of managing the affairs of this federation, faithful attendance, sincere interest, and meaningful participation at board meetings are essential. The general welfare and success of your federation is your responsibility.

Are you willing to accept the office in the _____ Federation to which you have been elected, and are you willing to assume the responsibilities thereof?

If so, please raise your right hand and repeat after me. ‘I accept the office to which I have been elected and its responsibilities. I reaffirm my adherence to the Cosmopolitan principles, and I pledge my honor thereto.

BOARD SERVICE

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GOVERNANCE

BOARD SERVICE & GOVERNANCE

- Serve as a full voting member of the Board, representing the interests, needs, and perspectives of their Federation.
- Attend all board meetings, retreats, and strategic planning sessions.
- Participate in board committees and contribute to policy development, strategic decisions, and program oversight.
- Report regularly to the Board on regional activities, challenges, achievements, and member feedback.

Responsibilities

- Set up dates on your calendar for CI Board meetings – monthly zoom meetings and one in-person meeting in late February, early March.
 - Report to the Board on the activities of the federation/clubs.
 - Relay concerns, problems, or ideas that clubs identify.
 - Provide feedback.
- Send in monthly reports for CI Board meetings (1 week ahead of meeting)
- If possible, consider volunteering to serve on a CI committee or assist with a special project or initiative.
- Attend the International convention.
- Invite the CI President or representative to attend the federation convention.
- Judge one International Award entry.

What is the Governor of the Year Award and how do I qualify?

The Governor of the Year Award was established to recognize the work done by a Federation Governor of a successful federation. To be eligible for the award a Governor must meet the following criteria:

1. Net membership increase in the federation.
2. Attend previous or upcoming International Convention
3. Attend at least 75% of CI Board Meetings.
4. Submit a CosmoTopics article.
5. Ensure that the federation conducts an annual convention and at least one additional Federation Executive meeting.

CI International President determines the winner.

CALENDAR OF ACTIVITIES

SET UP / PLANNING

Set-Up or Start Up July

- Determine if you are going to have a monthly newsletter and set/determine the format you want. If you do not want to do a newsletter, you should send out emails to keep everyone up-to-date and highlight vital information or upcoming events, deadlines, etc. Note: if you do a monthly newsletter send to members, HQ, and Federation Governors and save as a PDF
- Send the list of the Federation Executive to CI Headquarters (HQ) and ask that they update ClubRunner accordingly.
- Review Minutes of Annual Convention, as distributed by Secretary and follow-up on any items. If necessary, contact the Past Governor to determine if there are any outstanding items or projects that require follow-up.
- Make sure Secretary updates Bylaws if there have been any changes at the federation convention. Ensure the updated version is posted to the federation website and sent to CI.
- Set up federation contact list (attached); list of President/Secretaries
- Set up email distribution lists either through ClubRunner or the email system you use.
- Send a Welcome/Introduction to Members
- If you have a Federation Procedures Manual, remind Federation Executives of Procedures Manual and link; ask them to update and add notes throughout the year so the manual can be updated with current duties, suggested dates for doing various tasks, etc.
- If you plan to have regular meetings with your Federation Executive, set them up now with input from the Executive members as to what day and time works best for them. You can set up Zoom meetings on your own or get CI to set them up for you.
- Set up your calendar for reoccurring meetings or items. Include:
 - Regular Federation Executive meeting dates
 - Dates you plan to send out agenda, previous minutes, and Zoom information for the regular Federation Executive meetings (usually 1 week prior is best)
 - CI regular meeting dates AND about 1 week ahead of those dates make a note to send in your Governor report about what is happening in federation and/or clubs.
 - Newsletter or email dates if you plan to do on a regular basis.
 - Regularly promote awards and upcoming convention dates

September/October

- Arrange for Governor's Visits. Depending on your federation and the funds available to you for travel, you may be able to visit each club at least once and possibly more. The visits can be done at anytime throughout the year but, if possible, plan as much as possible and as early as possible. Check with the Club Presidents - do they have any special events, celebrations, or fundraisers that they would like you to attend?
 - Have this information available to you when travelling.
 - Membership Form
 - Cosmo Pledge
 - Installation information
- Promote Cosmo Day activities, events. Cosmo Day is the first Saturday in November

End of February/beginning of March

- Attend in-person CI meeting (cost for you to attend is covered by CI for you. The cost is also covered for the Governor-Elect provided there is official training sessions for the Governor-Elect at the meeting.

You will be in contact with the Convention Host Club throughout the year.

Allow at least one month prior to convention to ensure any preparation work on your part that must be completed. Items such as:

- Collaborate with secretary and set deadline date for submission of reports and agendas for the convention; send notification to Executive and Presidents to get reports submitted by deadline.
- Prepare your agenda and report for federation Convention.
- Prepare farewell speech or notes.
- Check with host club – normally it is your responsibility to appoint Sgt at Arms for convention meeting.
- Update Governor's Banner with new Governor name and arrange for gavel for the new Governor.
- Determine if you want to purchase any gifts and/or thank you cards for your Executive (this is at your own personal cost)
- Ensure Lt. Governor in charge of Awards has everything in order – certificate or recognition gifts for the award winners; has a committee set up to judge the awards, etc.

Federation Convention

- Attend Federation convention – bring Governor banners, Governor medal and gavel, and Governor pin to give to new Governor.
- Host convention meeting.

June

- You are almost done – contact Governor-Elect to discuss any items, projects that require follow-up during the upcoming year. Let the Governor-Elect know that as Past Governor you are there to support them, provide mentorship, and assist them during their year.

RESOURCES

As Governor you are responsible for understanding and promoting:

- Our Foundation, CDF/CFCI
- Our Cosmo brick program
- Our International Project

Information on each is attached and can be found on ClubRunner.

FEDERATION CLUB PRESIDENT & SECRETARY EMAIL/PHONE NUMBERS

<p><u>(NAME) Cosmopolitan Club</u></p> <p>- President: Tom Jones - Secretary: Tom Jones - -</p>	<p>Cell: 955-231-9765</p> <p>Home: Cell:</p>	<p>tom.jones@gmail.com</p>
<p><u>Edmonton Cosmopolitan Club</u></p> <p>President: Harold Flynn</p> <p>Secretary: Susie Smith</p>	<p>Home: 955-213-4422 Cell:</p> <p>Home: 955-476-8675 Cell:</p>	<p>hflynn_23@hotmail.com</p> <p>ssmith@telus.net</p>
<p><u>Prince Albert Cosmopolitan Club</u></p> <p>President: Gord Tallon</p> <p>Secretary: Bob Jamee</p>	<p>Cell: 360-9765-7800</p> <p>Home: 360-749-5572 Cell:</p>	<p>Gtallon57@hotmail.com</p> <p>bjamee@sasktel.net</p>
<p><u>Regina Cosmopolitan Club</u></p> <p>President: Tim Froom</p> <p>Secretary: Greg Tessier</p>	<p>Home: 360-537-9320 Cell:</p> <p>Home: 360-764-9078 Cell:</p>	<p>tim.froom@hotmail.com</p> <p>-</p> <p>gregtessier@gmail.com</p>

_____ FEDERATION EXECUTIVE OFFICERS

Name	Address	Contact #'s	Email	Position
Gord Anderson	925 Cedar Way Calgary, AB T9N 5T7	C: 407-957- 2200	ganderson@shaw.ca	Governor
Keith Smith	527 Reil Drive Regina, SK S4U 5Y9	H: 360-765- 4862 C: 360-442- 9076	keith.smith@sasktel.net	Governor-Elect
Greg Hamilton	PO Box 677 Brandon, MB R9A 5C6	H: 240-555- 0962	greghamilton@gmail.com	Lt. Governor, Awards & Conventions
Terry Fast	372 Knight Way Saskatoon, SK S5V 9K0	C: 306-557- 4714	tfast@outlook.com	Lt. Governor, Membership & Education
Debra Allen	447 Idol Drive Saskatoon, SK S5T 1X9	C: 360-957- 1146	debra.allen@hotmail.com	Lt. Governor, Marketing & Fundraising
Tammy Sunday	155 Ave NE Edmonton, AB T9R 7C3	C: 708-405- 1224	tammysunday@hotmail.com	Secretary
Shawna Willem	65 Nottingham Crescent St. Albert, AB T6V 3R9		shawnawillem@yahoo.ca	Treasurer
Art Newburg	PO Box 717 Christopher Lake, SK S8N 3V8	C: 360-215- 6540	artnewburg@hotmail.com	Judge Advocate
Karen Fornwald	357 Chuka Way Regina, SK S8B 2M8	H: 360-943- 2177 C: 360-889- 6452	Karen.fornwald@yahoo.com	Past Governor

UPDATING CLUB ROSTER MEMBERSHIP INFORMATION

For Secretaries – Adding/Updating/Removing Members from Club Roster in ClubRunner:

It is important that club member information be kept up to date on ClubRunner (CI website) as it impacts billing at both the Federation level and the Cosmopolitan International (CI) level. Adding and removing members is normally restricted to Club Secretaries. Secretaries can also update member information.

To access the How-to Information on the CI website, sign in with your username and password. Once signed in, select “Resources” on the HOME page. From the drop-down menu select “Members Only Documents,” select “Club Information” and from the drop-down menu select “Club Tasks” and then select “Adding/Editing/Removing Members from your Club Roster.” Follow the instructions as outlined in the document.

Following is a summarized version of the instructions on ClubRunner:

Adding a New Member:

- Sign In with your username and password
- Click: Member Area (top right of screen)
- Select: Memberships
- Select: Clubs & Membership
- Under “Member by Type,” select “Active Members List”
- Select Club: select your club from the drop-down menu
- Once your club members are displayed, click on the “Add New Member” orange button to the right
- Enter the information:
 - Organization Information: Regular (Active) membership will default
 - Enter: Sponsor (select from drop down menu)
 - Enter: Date joined
 - Members Details
 - Enter the information as per the Member Application form
 - Club Runner Account Information will fill in automatically based on the information entered by you in the Members Details area
- Once the information entered is complete, click “Add Member” (blue button on bottom of page)

When you click on “Add Member,” a page with Members Details, Home, and Work page will appear. On these pages, you can add other details. Ensure the email, date of birth, home address, and phone numbers are entered. Select “Save”. Once back to the member profile page, click on the Privacy tab, check to ensure that ClubRunner Connect is checked. Your new member should now be added to your club listing.

Editing a Member’s Information

Sign in/click “Member Area”/select Memberships/select Clubs and Membership/Under Member by Type select Active Members List”/select your club from the drop-down list/ select the name you want by scrolling through the list or selecting the alphabet letter of the last name.

Click on the name of the person, click the “Edit” button, update the information, and save. You must save for each tab area that you update.

Removing a member

As above, select the person that is to be removed. Once you have the member shown on the screen, select “Change Status” option to the right of the name. Select the “Terminate Membership” option. Once you confirm you want the member terminated, they will be listed on the Inactive Member listing and removed from your club listing of active members.

Examples you can access:

Federation website, federation procedure manual, federation bylaws, federation minutes, etc. are available on the Western Canada Federation website <https://wcf-cosmopolitan.org>

The Mo-Kan Federation and North Central Federation also have resources available on the CI website, under Resources, click on the Federation.



PROTOCOL

For Visits by the International President, International Officers and Federation Officers

A visit to a club by the President or other International Officer of Cosmopolitan International or by a Federation Governor is an important event in the club's activities.

It is an event for which you should make complete preparations. Your attention to all details such a visit implies is very important. How well this is done will greatly affect the opinion others will have of the club and its members.

Remember—a good job is one that will play a vital role in bringing all clubs in our organization closer together.

PROTOCOL? FOR WHOM? WHY?

During their terms in office, the International President and officers as well as Federation Governors, have many duties to perform in addition to their principal task of making a living. As a part of their contribution to the organization and its members they plan as many visits to club and federation events as time and finances permit. Because of these duties and their own personal business, it's impossible to visit every club and federation convention during the year. To complicate matters, several federations hold their conventions concurrently.

Here are a few suggestions to follow when arranging the program for a visit by the President, an International Officer or a Federation Governor.

RECEPTION COMMITTEE: This committee, appointed by the club president, or federation convention chairperson, should be present at the airport and also at the hotel to greet the officer (and spouse, if accompanied) upon arrival. Ample time should be allowed for rest if the visit is part of an extended trip.

A member or members of the Reception Committees should be assigned to assist the visitor and his/her spouse throughout the visit.

HOTEL ACCOMMODATIONS: The club president or federation convention chairperson makes hotel reservations for a suite or comfortable room, thereby being certain that everything is in order. Hotels have been known to make mistakes!

REGULAR CLUB MEETING: If the time does not permit an evening meeting with the visiting officer, the itinerary, if possible, should have him/her arrive on the meeting day. In many cases this is not possible, and arrangements should be made to change the meeting day for that particular week, giving all members ample notice of the change.

In any event, there should be no planned program or C.O.D. for that meeting. Time normally allotted to the speaker should be given to the visiting officer.

If the officer's spouse is traveling with him/her, a joint meeting should be arranged, one that can be conducted in the same manner as all regular meetings, except that sufficient time should be allowed for the visitor to speak to the group. Alternatively, other arrangements must be made to host visiting dignitary's spouse, such as a luncheon or dinner.

Upon arrival at the hotel, the club president will have provided the visitor with a written program of scheduled events, permitting suggestions and input to that program.

BOARD OF MANAGERS MEETING: If possible, it is desirable to arrange a meeting with the club's board of managers. Often, many questions can be answered and problems resolved at such a meeting.

INDUCTION OF NEW MEMBERS AND INSTALLATION OF OFFICERS: The International President, International Officers and Governors are prepared to induct new club members or install club officers. Clubs should take advantage of their presence to have new members receive the Cosmopolitan pledge, membership pin and certificate or to have the installation of new officers. Make sure that the visiting officer is advised, upon arrival, of the names of new members or new officers, to be installed.

FEDERATION CONVENTIONS: The International President or a designated representative will attend each federation convention of Cosmopolitan International. The procedure should be followed at these conventions as is suggested for club visits.

Remember! The Federation Governor is the chief executive officer of the federation (and its convention) in the same way that the International President is the chief executive officer of the International organization (and its convention).

Federation conventions are essentially oriented toward federation business and activities, all within the framework of its own bylaws and those of International.

HEAD TABLE SEATING: The place of honor is that to the immediate right of the banquet chairperson, and that place should be afforded to the dignitary being primarily honored on that occasion. Depending on the function, that person may be the International President or the Federation Governor, or perhaps a very special person who may be the guest speaker. The banquet chairperson's chair should be to

the right of the podium, so that other head table guests flank the honored guest. Couples may be seated side-by-side, but frequently head table guests often prefer to be seated apart from their spouses to provide more opportunity for conversation with the other guests. Place cards will facilitate the seating plan and avoid confusion as to who sits where.

Head table guests should be escorted to the table rather than being allowed to find their own way. It is a nice touch to line them up outside the banquet room in the proper order and lead them to the table. At the very least, the banquet chairperson should escort the primary dignitary and his/her spouse to the table and assist them to find their proper places.

Space at head tables is often limited, but consideration should be given to inviting other officers and past officers to that table whenever possible. Past international Presidents, particularly, should be afforded this honor, as well as past governors of the federation, especially the immediate past governor. At times there may be too many dignitaries that the occasion would like to recognize, and a special reserved table can be set up in front of the head table for such persons.

DEPARTURE: The club president, along with a group of members of his club, should be present when the visiting dignitary departs. A ranking federation officer should do likewise in case of a federation visit.'

It is a courtesy to offer assistance in the transfer of baggage, arrangement of transportation or the supplying of travel information.

WHO COVERS THE EXPENSES?

International reimburses the international President and International! Officers only for actual economy class airline transportation. Each federation has its own arrangement for covering travel expenses of its officers.

Be it International or federation, the fact is that such reimbursement does not cover all travel expenses, such as meals, tips, valet service, and so forth.

When the dignitary visits a club, Cosmopolitan courtesy dictates that the club shall make arrangements, before actual departure, to cover the following expenses:

- a) hotel suite or room
- b) other reasonable hotel charges, such as meals, local phone calls, valet service and 80 on
- c) if possible, a bottle of liquor or wine and set-ups or a fruit basket or snacks.

When the International President and his/her spouse (or the President's official representative and spouse) come to a federation convention, then It is the federation that is their host, and therefore the following expenses are to be covered by federation convention funds:

- a) hotel suite or room
- b) other reasonable hotel charges, such as meals, local phone calls, valet service and so on

if possible, a bottle of liquor or wine and set-ups or a fruit basket or snacks

c) convention packages for both.

The federation is not obliged to cover similar expenses for any other International Officer attending. Furthermore, if, after having designated an official representative, the International President decides to attend, It is expected that the above listed expenses are to be paid only for the official representative and his/her spouse.

Ideal conditions and a warm congenial atmosphere are developed where all or most of the courtesies are observed as suggested. This friendly and courteous attention marks the difference between a successful meeting and one that leaves much to be desired.

COMMON COSMOPOLITAN COURTESY CHECKLIST

1. Have you notified the visiting officer you are aware that he/she is going to visit your club or federation and have you restated the specific dates?
2. Have you notified all local members and federation officers so as to have maximum attendance at meetings with the visiting officer?
3. Have you checked to see if the visiting officer's spouse will be in attendance?
4. Have you made arrangements for the visiting officer's hotel accommodations and notified him/her of the exact address and telephone number of the hotel?
5. Have you made arrangements for greeting the visiting officer both at the airport and at the hotel?
6. Have you made arrangements with the hotel to bill the club or federation and advised the visiting officer accordingly, so as to avoid last-minute embarrassment?
7. Have you arranged for bar set-ups, fruit baskets or snacks in the dignitary's room?
8. Have you arranged for auto transportation while the dignitary is in town?
9. Have you provided the dignitary with information on the club or federation before attending the event? It is desirable that he/she receives such information by correspondence or telephone as far in advance of the visit as possible.
10. Have you arranged for a modest gift for the visiting dignitary and a token gift for his/her spouse to show your appreciation? Flowers, for example, can be difficult for the visitors to take with them, especially if traveling by air.
11. Have you advised the visitor and his/her spouse to type of dress to be worn at various events? Formal? Semiformal? Optional? At International conventions dignity is enhanced when dress is formal, and this is highly recommended.
12. Have you offered the visitor all the assistance necessary for his/her arrival, stay and departure? If your answer to all questions is YES, then you can consider yourself the perfect host