

CHAPTER PRESIDENT'S CALENDAR

Place in the front of the President's Book. Check off each item as completed.



MONTHLY/QUARTERLY

Approximately monthly, the chapter's Board Buddy from the Kansas State Chapter Executive Board emails a Tech Note to the chapter president and/or tech contact.

- See that the "starred" items in the Tech Note are read to the chapter during the technology report or under correspondence.
- Distribute all other items to the appropriate officers and committee chairmen in a timely fashion, as some information is time sensitive.

Quarterly, download *The P.E.O. Plains Journal* from www.peokansas.org (*Connections* link, *Plains Journal*).

- See that the "starred" items, including the KSC president's letter, are read under correspondence. It is not necessary to read all the "starred" items at the same meeting.
- Distribute information and materials to appropriate officers and committee chairmen.
- Forward *The P.E.O. Plains Journal* to all chapter members highlighting items of interest.
- Print copies of *The P.E.O. Plains Journal* for members who do not have computer access. If this is a large number, build costs into your chapter budget.



MARCH (for Incoming President)

After installation of officers, preside over the conclusion of the business meeting. Don't Panic. This is scripted in the President's Book.

Set a date for the annual transition meeting with all incoming and outgoing officers. A transition meeting ensures an orderly transfer of supplies and exchange of information. Hold the meeting within a month of assuming office. Work with officers to set goals for the coming year.

Learn how to navigate www.peointernational.org and www.peokansas.org. The username and password are the same for both websites. Remember to add the year to the password. The year will be updated annually on January 1.

Become familiar with all materials and tools available to you as president.

- Read through the President's Book, including the Appendix pages. Note the instructions in italics.

- Read the Instructions to Officers of Local Chapters (IOLC), available on www.peointernational.org (*Resource Library link, Local Chapter Members, Manuals and Handbooks*) or in the Quick Links at the bottom of the Members Only home page. Make sure you have the most current version. Become familiar with the duties of all officers.
- Watch the *Online Training Videos* on www.peointernational.org (*Resource Library link, Local Chapter Officers, Local Officer Training*).

Learn the Special Work (the words whispered during the Ceremony of Initiation).

- Remind the vice president to learn this, too.
- Even if your chapter uses an initiation team, the president and vice president are required to know the Special Work.

Let the vice president know where you keep your officer supplies in your home.

Schedule a time to go with the incoming treasurer to the bank for signature changes on the chapter's checking account. **NOTE:** Local chapters are NOT to have a credit card.

NEW POLICY – Local chapters can now use a debit card to pay. The chapter must give prior approval before a debit card is used. (See Treasurer section of IOLC, page 2)

Appoint committees per your local chapter bylaws.

Send in your Local Chapter Officers' Workshop registration when applicable. Typically, your chapter will attend every few years. Refer to the schedule taken from the current *Proceedings* on www.peokansas.org (*Chapter Resources link, Officers' Workshops*).

Request the emblem from any member who became inactive March 1. Counsel her on the process of reinstatement. If the member does not return her emblem after two attempts, do not pursue it further. You have made a valid attempt.

Return the emblems of any inactive members that have been held in the president's box for three years to the P.E.O. Supply Department. Use the *Emblem Return* form available at www.peointernational.org (*Resource Library link, Local Chapter Officers, President*). If possible, contact the inactive member and invite her to reinstate before returning her emblem.



Helpful Hints:

Review and use the *Successful Officer Transition* materials at www.peointernational.org (*Resource Library link, Local Chapter Officers, President*).

Encourage incoming officers to review their *Officer Training Videos* on www.peointernational.org (*Resource Library link, Local Chapter Officers, Local Officer Training*)

prior to the meeting. Videos are available for the president/vice president, recording secretary, corresponding secretary and treasurer.



APRIL/MAY

See that all officers are installed. If an officer is not installed before May 1, the office is declared vacant and you must appoint a replacement.

Chapter delegates and visitors who attend Convention of Kansas State Chapter must register at www.peokansas.org (*Convention link, this year's Convention*). Golden Girls will receive specific instructions and will register online at www.peokansas.org. Watch for deadlines.

- Have the delegate review all convention materials.

Attend the Local Chapter Officers' Workshop with your chapter leadership team if this is your scheduled year.

Receive the released and approved annual reports of the corresponding secretary and the treasurer. (Releases are mailed to the president who signed the reports.)

- Give the appropriate copy to each officer and keep the second copy in the president's box. Current policy requires that these forms be kept for six years.
- Have the corresponding secretary and the treasurer read the annual reports to the chapter during their next monthly report.

Read and discuss proposed amendments to be voted upon during state convention.



Helpful Hints:

When your chapter sends an invitation to membership, serve as chairman of the counseling committee and appoint others, preferably sponsoring members, to join you.



JUNE/JULY

Attend Convention of Kansas State Chapter if you are the delegate.

See that the convention report is given within six weeks of convention.

- The report must be given at a regular business meeting, not a social meeting.
- Distribute all materials from convention to the appropriate officers and/or committee chairmen.

If preparations haven't already begun, see that work starts on a new yearbook. Refer to the *Yearbook Review Checklist* on www.peokansas.org (*Chapter Resources* link, *Forms & Tools*, *General Interest*).

In odd-numbered years, schedule a Report of Convention of International Chapter. **NOTE:** It is no longer a requirement for delegates to give reports in person. However, these delegates are encouraged to give reports in most years, but not in 2021. If the delegate does not schedule a time to meet personally, your chapter is responsible to give a report in October or November. Per the bylaws, the Kansas State Chapter Executive Board will provide report information to local chapters within 14 days of the close of Convention of International Chapter.



Helpful Hints:

If your chapter does not meet during the summer:

- Have the chapter vote to allow the treasurer to pay bills.
- Keep in touch with chapter members through newsletters or informal social gatherings.
- Maintain contact with your project recipients and applicants. Invite them to any appropriate social occasions.
- Use some of this “light” time to familiarize yourself with the president’s part of the Ceremony of Initiation. These inspiring words can help you lead the chapter, one paragraph at a time.



AUGUST

If your chapter is scheduled to receive an Official Visit in the fall, prepare for the visit.

- Download official visit forms from www.peokansas.org (*Chapter Resources* link, *Official Visits*)
- Meet with your officer team to complete the required information.
- You may be asked to change your meeting date and time. Be flexible.
- Do NOT schedule a program that day.



SEPTEMBER

Confirm that yearbooks will be sent by October 1 to each KSC state officer, the executive secretary and executive treasurer. A printed copy must be sent to the KSC president; all others may be sent electronically. Use a Word document or a .pdf.



Helpful Hints:

If your chapter has not met during the summer, refresh yourself on meeting procedures.

If your chapter has goals, now is the time to do a mid-year review.

Review the *Proceedings* posted on www.peokansas.org (*Chapter Resources* link, *KSC Proceedings & Bylaws*).



OCTOBER/NOVEMBER/DECEMBER

Changes approved at Convention of International Chapter may NOT be implemented until the results are printed in the November-December issue of *The P.E.O. Record* AND until chapters receive specific instructions in the winter mailing. 2021 is a year for Convention of International Chapter.



JANUARY

Review the winter mailing materials sent by International.

- Distribute materials as necessary.
- Three copies of the *P.E.O. Constitution* are included in even-numbered years. One copy is for the president's box and the other copies are for lending to officers as needed and/or prospective members after pre-acceptance counseling.

Distribute annual report packets to officers immediately upon arrival. You will receive packets from Kansas State Chapter and P.E.O. International.

- **Be sure to check the Kansas instructions for annual reports first.**
- Report information for the corresponding secretary and treasurer are sent from International, but Kansas materials and envelopes need to be added to the International information.

Appoint the Nominating Committee (or when directed by chapter bylaws) and remind members when a slate of nominees should be presented to the chapter.

Appoint the Budget Committee (or when directed by chapter bylaws). Remind the committee to have the budget ready for presentation at the March meeting (or as outlined by chapter bylaws).

Appoint the Auditing Committee (or when directed by chapter bylaws).

- Download *Instructions for Auditing* posted on www.peokansas.org (*Chapter Resources* link, *Forms & Tools*, President).
- The committee will need to arrange a time with the treasurer to audit the chapter's financial records after she has closed the books for the previous year.
- The committee should prepare a report to be presented at the first meeting after the audit is complete.

Appoint or activate a committee to review local chapter bylaws and standing rules.

- Vote on any changes needed. Keep a current copy of the bylaws and standing rules in the front of the President's Book.
- If amended, have the recording secretary submit changes to the KSC secretary.
- Bylaw changes approved at the state or International conventions that affect local chapter bylaws do not need to be voted upon by the chapter but must be submitted as a change to the KSC secretary.



Helpful Hints:

Remind members that dues are delinquent March 1.

If you haven't done so already, have your chapter vote on annual donations to the six International projects and two Kansas P.E.O. projects. Chapter gifts must be received by the last day in February for your chapter to be recognized on the state gift list in the *Proceedings*. Donations forms can be found at www.peokansas.org (*Chapter Resources* link, *Forms & Tools*, *Treasurer*).

If you haven't initiated since installation of officers, conduct an exemplification of the balloting procedure and the Ceremony of Initiation. Annual exemplification is required per KSC bylaws.



FEBRUARY

Have the corresponding secretary read aloud the list of inactive members.

Read your annual President's Letter under New Business.

- Download the Guidelines for Annual President's Letter at www.peokansas.org (*Chapter Resources* link, *Forms & Tools*, President)
- Have the chapter vote to approve the letter.

- Send a copy by March 1 to the KSC president and to your nonresident and non-participating resident members.
- Keep a copy in the President's Box.



Helpful Hints

You MAY initiate in February. **NOTE:** As a courtesy to an initiate, some chapters vote to pay the initiate's state and International dues for the next year, or they choose not to initiate during January and February. Explain the P.E.O. calendar year to the candidate. She may be more than willing to pay both the dues and her initiation fee.

You MAY NOT read a letter of acceptance for an invitation to transfer in February. If a letter of acceptance for an invitation to transfer in is not read by the last day in January, the woman should pay dues to her current chapter. The transfer may be completed after March 1.

Ask officers to check supplies. Supplies may be downloaded from www.peointernational.org or ask the treasurer to place an order through the Supply Department in Des Moines.



MARCH (for Retiring President)

Preside at the first meeting in March through the installation of officers.

Have the Auditing Committee give its report. Vote to accept the report.

Have the Budget Committee give its report. Vote to accept the proposed budget.

Sign the annual reports of the corresponding secretary and treasurer, after checking to see that the numbers for total active members, initiates and reinstatements listed on each report agree.

- Do not sign the reports unless the two officers have conferred.
- Confirm that the reports are mailed by March 10.
- Do not have the outgoing treasurer and corresponding secretary transfer their books and supplies until the end of March.

Remind the outgoing corresponding secretary (or the technology contact) to immediately report the following on www.peointernational.org (*Resource Library link, Local Chapter Officers, Corresponding Secretary*) and update as needed:

- Election of officers.
- Election of delegate and alternate to Convention of Kansas State Chapter.
- Election of delegate and alternate to Convention of International Chapter (when applicable, odd-numbered years only).

Clean out your files and prepare to instruct the incoming president. Help set up the annual transition meeting with all incoming and outgoing officers.