## **PRESIDENT’S CALENDAR**

### **MARCH**

**At or before the first meeting in March, by the outgoing president, and before installation of new officers, the following business shall be conducted:**

1. An election of officers, delegates and alternates to state convention, delegate and alternate to International Convention (when eligible).
2. Remind outgoing corresponding secretary and outgoing treasurer of annual reports due **before** March 10th. These reports **must** agree with one another before the outgoing chapter president signs them.
3. Remind outgoing recording secretary to:
   1. Copy annually the local chapter bylaws and standing rules in Recording Secretary’s Record Book, recording amendments when they transpire, following instructions in front of the book.
   2. Distribute complete copies of bylaws and standing rules (if amended) to:
      1. Chapter president.
      2. Yearbook chairman (for inclusion in new yearbook).

Only if there are changes:

* + 1. Secretary of Alabama State Chapter by March 10th. If there are no changes, the secretary should inform the secretary of state chapter that no changes occurred.

1. See that the new budget (prepared after books are closed) is presented by the budget committee. While this is not a requirement, it is recommended that all chapters have an annual budget.
2. Remind outgoing philanthropy chairs to send annual reports to the appropriate state committee chair. by March 10. Annual reports can be found on the state website at peoalabama.org under Local Chapters / Forms. Philanthropy chairs may send completed forms by email or USPS.
3. Installation of Officers – Second term officers are included.

**After Installation – With incoming president presiding:**

1. Immediately after installation of officers in March, remind the corresponding secretary to enter online the information for the Report of Election of Officers, Philanthropic Committee Chairs, Delegates to Convention and Nominees for Delegate to Convention of International Chapter (when eligible).
2. Get personal instructions on all materials pertaining to the office from the previous president and ensure that room and meal reservations are made IMMEDIATELY for the upcoming state convention.
3. Ensure that a joint meeting of all outgoing and incoming officers is scheduled and **held within one month after installation**, and all supplies and documents listed on the current List of Supplies for Officers of Local Chapters (from the International website) are passed on to new officers. At this meeting (as a minimum):
   1. Evaluate Chapter Cascading Goals and policies. The International website has a number of tools to help you in setting meaningful, achievable and challenging goals.
   2. Review tools of the office.
   3. Discuss Counsel for Membership Booklet.
   4. Advise that the convention proceedings for both state and International are located on the websites.
   5. Exchange information about duties and responsibilities.
   6. Have the Treasurer order necessary supplies.
   7. Read through the Ceremony of Initiation together.
   8. Make sure philanthropic and membership chairs send in annual reports to the state committee chairs before March 10th and distribute philanthropic folders and materials to new chapter chairs.
4. Remind each officer or initiation team member to check out the Ceremony of Initiation for an exemplification two months before exemplification is scheduled if an initiation has not been performed during the year. This exemplification is for the new officers and gives them an opportunity to show their capabilities and be ready for the initiation of a new sister when the time arrives.
5. **Verify that the President and Vice President know the Special Work. Remember that it includes the ENTIRE section, not just the secrets.**
6. Review all materials in the president’s box with the vice president. Tell her where you will store your materials.
7. Appoint committees by the first meeting in April. Be certain the corresponding secretary records the committee chairs by May 1 on the International website so they can receive their materials from both the state and International. **Names must be entered every year even if the chair does not change.**
8. After the treasurer's book is audited, the Audit Committee gives a report at the first meeting following completion of audit. Chapter vote approves the report.
9. The Local Chapter Supply Order Form may be downloaded from the International website (under Resource Library – Local Chapter Officers - Treasurer - Local Chapter Supply Order Form). Supplies can also be ordered online using a personal credit card and submitted for reimbursement.
10. Make sure the appropriate chapter officers know the date and location for Chapter Workshops and make plans to attend **IF** Chapter Workshops have been scheduled.
11. Read “Release from Office” (the returned copy of the Annual reports) for treasurer and corresponding secretary at the first meeting after receiving the reports, and record in the minutes.

### **APRIL/MAY**

Items to take to convention of Alabama State Chapter:

* Personal emblem.
* Copy of any proposed amendments to the bylaws sent to you by the State Amendments and Recommendations Committee.

### **MAY**

1. Chapter report of Convention of State Chapter. A called meeting for the report is necessary if there is no meeting scheduled after the convention before a summer vacation.
2. When Part II of the Proceedings of State Convention is completed by state chapter with bylaw changes, these changes are effective immediately. Make the changes in your bylaws and recopy amended bylaws for chapter officers.
3. Treasurer should order needed supplies for officers. Make sure all forms have a current date. The newest forms are on the International website.
4. Request chapter’s authorization to allow payment of summer bills (for those chapters that do not meet during the summer.

### **JUNE**

1. You have two options to submit your yearbook:
   * 1. Send electronically to each member on the state board and print and send one copy to the Alabama State Chapter Secretary for display at state convention.
     2. Send a total of 6 printed copies: one to each board member with two copies to the Alabama State Chapter Secretary, one to be displayed at state convention
2. Reciprocity Committee should keep in contact with unaffiliates over the summer and invite them to any summer functions/social gatherings (for those chapters not meeting).
3. Let the vice president know your summer plans (for those chapters not meeting during the summer).
4. Remind members who are moving to change address by completing the Member Update (Formerly the Change in Membership) form on the international website.
5. The chapter corresponding secretary may also assist in updating addresses.
6. Remind officers to read the revised state bylaws and standing rules which will be posted on the peoalabama.org website after convention. A hard copy is optional for each officer.

### **JUNE/JULY/AUGUST/SEPTEMBER**

1. Review committee appointments and make any necessary changes. Arrange for instruction and any needed supplies.
2. Review tools of the office. (See March)
3. Set Goals with philanthropy chairs.
4. Review philanthropic materials.
5. Recruit students.
6. Make college, high school and community contacts.
7. Plan fundraising.
8. Consider joint project efforts with neighboring chapters.
9. Consider a review of the president’s box as a possible substitute program. Chapter should see Convention Proceedings and chapter history (scrapbooks, pictures or videos) during the year.
10. Prepare for the visit from the organizer of the state chapter, or her proxy, when appropriate.

### **OCTOBER**

The Report of CIC (Convention of International Chapter) in odd numbered years can be found on the International website. Share with your chapter.

### **NOVEMBER**

1. Any changes in the Constitution or Bylaws voted upon at Convention of International Chapter (held in odd numbered years) shall become effective as soon as published in THE P.E.O. RECORD. Change chapter bylaws as needed.
2. Consider chapter contributions in addition to amounts budgeted for the philanthropies.
3. Consider suggested additions or changes to the bylaws of state chapter that your chapter wishes to propose to the Amendments and Recommendations Committee by January 20.
4. Appoint Nominating Committee, or activate current committee, depending upon which method chapter uses.
5. Check with your members to see if anyone may be interested in serving on the Executive Board of the Alabama State Chapter or a state committee. A letter and other information will be sent by October 1 of each year. This letter is to be read to the chapter and if the chapter wishes to nominate someone then the nominee’s name and her information should be submitted to the State nominating chair/committee by January 15.

### **DECEMBER**

1. Treasurer notifies and may begin collecting dues from all active members.

### **JANUARY**

1. Celebrate Founders’ Day this month either in the chapter or through Reciprocity.
2. Begin outlining the president’s letter.
3. To ensure chapter philanthropy gifts are recorded in the proper year, have the treasurer send any gifts your chapter wants considered in this year’s convention reporting by the end of January.
4. ELF Legacy Chapter, IPS Partners in Peace Chapter (along with the online form which should be included to the state treasurer), PSA Laureate Chapter, STAR Constellation Chapter, PCE Brighter Tomorrow Chapter, Cottey College Luminary contributions, and all project contributions must be received by the Alabama State Treasurer by January 31, in order to get them to the Executive Office by the stated deadlines, and for chapters to receive credit at the state convention in that year. Otherwise, recognition will be given the following year.

### **FEBRUARY**

1. It is helpful for the outgoing president to train the incoming president before installation.
2. No transfers may be extended or accepted in February. You may initiate.
3. Treasurer collects dues.
4. Activate and meet with the Finance Committee to draw up a budget for the new year, (i.e., March 1 to February 28/29). Present at the first meeting in March and vote on this at the next meeting. A budget is recommended, not required.
5. Read President’s letter under Item # 9, New Business, at the first or second meeting in February. Chapter votes approval. Send it to the president of the State chapter before March 1st. You are encouraged to email copies to non-resident members and to resident members who are unable to attend regularly. File a copy of the letter and report in the president’s box; keep for the life of the chapter. Historian may also keep copy.
6. Remind officers and committee chairs that annual reports are due. The treasurer’s annual report must be retained for 6 years. The chapter president may also receive forms and information from the president of State chapter. Ask your philanthropy chairs to download their annual forms from the Alabama website and return completed form by email or mail to appropriate state philanthropy chair.
7. Arrange for Auditing Committee to audit treasurer’s books after closing February 28/29th. See current Auditing Committee Instruction Sheet online.
8. Check corresponding secretary and treasurer’s annual reports of March 1st. Sign after checking for accuracy and consistency. Call for the reading of the approved annual reports by the corresponding secretary and treasurer with the first monthly reports following receipt of the approved copies. **Remind the recording secretary that she is to send any changes in chapter by-laws to the Alabama Chapter state secretary, and if there are no changes, notify her that there are no changes.**
9. Reports are due to state officers no later than March 10th. Corresponding secretary should not hold up annual report until election of officers. Newly elected corresponding secretary and treasurer may not begin their work until the previous officers are released by officer of state chapter.
10. Submit Alabama Star Challenges achieved by your chapter to the Alabama State President via email or USPS no later than March 10. This information is included in the annual President’s letter.