

PRESIDENT'S CALENDAR

New York State Chapter, P.E.O. Sisterhood
2022 - 2023

FEBRUARY – Incoming President

1. Begin to review materials on the International website under **Resource Library > Local Chapter Officers > President** and the President's section of the Instructions to Officers of Local Chapters (IOLC).
2. Work with outgoing president to finalize committees.
3. Print this President's Calendar and begin to check of completed items.

MARCH – Outgoing President

At the first business meeting in March, conducted by the **Outgoing President**, and before Installation, the following business shall be conducted:

1. The Audit Committee may be reporting at this meeting or at the second meeting in March. (Search "auditing committee instructions" on the International website and pass on check sheet to auditors.)
2. Election of officers, delegates and alternates to New York State Convention, delegate and alternate to International Convention (when eligible) and representatives to your reciprocity, if appropriate.
3. Remind outgoing corresponding secretary or technology contact to file online:
 - a. Report of Election of Officers of Local Chapter filed annually – even if they stay the same
 - b. Report of State/Provincial/District Convention – Delegates & Alternates (Corresponding Secretary reports delegate, delegate registers herself for convention on NYS website)
 - c. Report of International Convention – Nominee for Delegate (when eligible) (Corresponding Secretary reports delegate on the International website, delegate registers herself for convention)
 - d. Local Chapter Report of Project Chairmen
4. Confirm with the outgoing corresponding secretary and outgoing treasurer that the Annual Reports will be mailed by March 10. Be sure to confirm that the reports agree regarding membership numbers. ***This process is moving online in 2023!***
5. Remind the outgoing recording secretary to:
 - a. Copy the updated local chapter bylaws and standing rules in Recording Secretary's Record Book. These should precede the Minutes of the first meeting in March. Follow any instructions sent from the Amendments and Recommendations (A&R) Committee regarding reporting of your bylaws and standing rules and send to AandR@peonewyork.org or log onto the NYS website > Local Chapters > Officers > Recording Secretary.

- b. Give copies of the updated bylaws and standing rules to the incoming president (for the President's Book) and yearbook committee, if the chapter's bylaws are included in the yearbook.
- c. Send a digital copy of your chapter's yearbook by April 15 to the NYS Secretary at secretary@peonewyork.org. In addition, check with your Reciprocity regarding their yearbook collection protocol. Provide a copy of your yearbook to your Reciprocity as is directed.

Installation of Officers (includes second term officers)

- a. Review this process in the President's Book and make the necessary arrangements.

MARCH – Incoming President

After Installation, the **Incoming President** will preside over the balance of the meeting.

1. Get all materials pertaining to office from previous president. Be sure that convention delegates receive all information regarding convention registration when registration opens.
2. Set a date for the Annual Transition Meeting with all incoming and outgoing officers.
 - a. This is to be held within one month of installation, and all supplies and documents listed on the current List of Supplies for Officers of Local Chapters are passed on to new officers at this meeting: Follow the Outline of Yearly Meeting for Local Chapter Officers available on the International website. Prior to Transition Meeting have officers review on-line training offered on the International and NYS websites. Encourage all outgoing officers to continue to mentor their successors.
 - b. Remind the vice president that she should know the Special Work.
 - c. Be sure the vice president knows where you will store your chapter supplies.
 - d. Be sure you and the vice president know where the guard, recording secretary, and corresponding secretary store their supplies.
3. Prepare a budget with appropriate members of chapter.
4. See that the audit committee gives its report after auditing the treasurer's books.
5. Receive release/approved annual reports of corresponding secretary and treasurer. Give appropriate copy to each officer and keep second copy in the president's box. The releases for these reports are to be read to the chapter with the monthly reports of both officers following receipt of approved copies.
6. Consider posting on Facebook about your new officers.

APRIL/MAY

1. Install any officer not present at time of election. (Officers must be installed before May 1st or the office is declared vacant, and a replacement is appointed.)
2. Attend the Spring Reciprocity meeting with as many chapter members as possible.
3. Share proposed amendments to New York State Chapter bylaws with the chapter when they are received from the NYS President.
4. Make sure delegates have registered for convention. Be sure your chapter delegates have their emblems and registered for any pre-convention virtual workshops.
5. Continue becoming familiar with the IOLC, President's Book, and International/State websites.
6. Local Officer Training takes place in April. Please make sure you and your officers attend these webinars.
7. Confirm that your chapter's yearbook has been sent to the appropriate state officer.
8. Report PEONY bingo results to your Reciprocity's representative on the NYS Membership Committee by April 15th.

JUNE

1. Your chapter's convention delegates should report on convention at the June or July meeting.
2. Provide copy of names and email addresses of newly elected state officers to the yearbook committee and chapter officers. Update Board Buddy information as well if needed.
3. Keep the vice president apprised of your plans if you are going to be out of town.
4. Review committee appointments and make any necessary changes. Arrange for instruction and any needed supplies.

JULY/AUGUST

1. Review tools of office.
2. If chapter does not meet during the summer, ask the social committee to plan some gatherings for your chapter. Be certain to invite your scholarship/grant/loan recipients if appropriate.
3. Set goals with project chairpersons and their committees.
4. Prepare for official visit from the NYS Organizer every third year. No other program should be scheduled on the day of her visit. Keep in mind that your regular meeting time may need to be adjusted to accommodate her schedule.
5. Consider posting on Facebook about your chapter's summer social.

SEPTEMBER/OCTOBER

1. Proceedings of the NYS Convention and updated NYS bylaws will be available on the NYS website during this month. Please make sure all chapter members know about this important resource—which includes contact information for all NYS officers and committee members—and know how to access it online.
2. Confirm date, time and place of Official Visit from the NYS Organizer or the Organizer's Proxy with all chapter members involved. Make sure all officers' supplies are current. Review chapter meeting procedures, look up information requested by the Official Visitor, and prepare any questions. Conduct practices of Ceremony of Initiation ahead of time.
3. Confirm date of Report of Convention of International Chapter, if applicable.

NOVEMBER

1. Does your chapter want to propose a change to the New York State Chapter bylaws, or to the P.E.O. Constitution? A proposal must be received by the Amendments and Recommendations Committee by January 1. You can reach the committee at AandR@peonewyork.org
2. By chapter vote, decide on distribution of contributions to projects. Instruct chapter treasurer to send chapter donations to state treasurer by December or January at the latest.

DECEMBER

1. Enjoy a social party of some kind with your chapter members, BILs and guests! Encourage your sisters to pay their dues at this party!
2. Are you or is one of your chapter members interested in serving on a NYS Committee or the NYS Executive Board? Please complete the *Committee/Board Service Interest Survey* found on the NYS website under Member Home > State Committees. Please email the completed form to the NYS Vice President at vicepresident@peonewyork.org by the end of December.
3. Encourage all members to pay their dues sometime in December! This provides tremendous help to your NYS Treasurer.
4. Consider posting on Facebook about how your chapter celebrates the holidays.

JANUARY

1. If not completed in November, vote on annual donations this month before state and local treasurers are busy with the Annual Reports process.
2. Receive the "Winter Mailing" from International Chapter and distribute documents to appropriate officers. Share the new Constitution and Proceedings of the Convention of International Chapter, which will be available on the International website in January of even years.
3. **The Annual Report process is moving online as of 2023. Please be on the look-out for online training (for you, your corresponding secretary and treasurer) and any**

hardcopy materials that need to be distributed regarding this process!

4. Celebrate Founders' Day this month or as scheduled in your chapter or your reciprocity.
5. Begin to outline your President's Letter, which is due to the NYS President by March 1.
6. Appoint a nominating committee or activate the current committee. Note: officers may be elected in January or February but are not installed until the first meeting in March.
All officers are elected annually.
7. Remind the treasurer to notify all members that their dues are due.
8. Encourage Program/Yearbook Committee to begin planning next year's programs. Remind this committee that yearbooks must be sent via digital format to the appropriate state officer by April 15. Yearbook guidelines can be found by logging in as a member to the NYS website > Publications.
9. Did your chapter successfully sponsor any project recipients? Post about it on Facebook!

FEBRUARY

1. Do not issue invitations to transfer in February. Transfers must be extended and accepted by January 31. Chapters may initiate new members this month but be mindful that she will be responsible to pay her initiation fee and then annual dues in a short period of time.
2. Appoint an auditing committee or remind current committee to audit the Treasurer's books when they are closed. Report on findings during the first meeting in March.
3. Read your President's Letter under New Business, at the first meeting in February. The chapter will vote to approve it.
 - a. By March 1, email the letter to the NYS President at president@peonewyork.org
 - b. Email or mail copies to nonresident members and resident members who are unable to attend regularly. Place a copy of the letter in the file in the President's Box that is kept for the life of the chapter. The Historian may have a copy as well
4. Remind the corresponding secretary and treasurer that annual reports should be completed between March 1- March 10. **Reports must be postmarked by March 10.** If questions arise, please contact your Board Buddy or the appropriate NYS Officer for help. Remember to keep copies of their annual reports for 6 years.
5. Remind the outgoing corresponding secretary and treasurer that they continue in their jobs until their releases are received.
6. Work with incoming president to finalize committees.
7. Ask your corresponding secretary to read the names of all inactive members at the February meeting. This is done so that any chapter members who have information on these sisters can update the chapter. Ask the corresponding secretary to file updates online by using the Member Update form. (Resource Library > Local Chapter Officers > Corresponding Secretary > Member Update)
8. Forward a copy of this President's Calendar to the Incoming President.
9. Consider paying the dues of any sister who has not responded to a dues request.