

## P.E.O. Local Chapter President's Monthly Reference Guide

### March

1. March 1<sup>st</sup> is **Introduce Your Family to P.E.O. Day**
2. After March 1 ensure that you, the treasurer, and corresponding secretary have **received email with link and access information for doing the online annual reporting.**
3. By or at the first meeting in March **nominate and elect officers, delegates, and alternate delegates.**
4. At the first meeting in March **install the elected officers.**
5. March 8<sup>th</sup> is **International Women's Day** – Celebrating the P.E.O. International Peace Scholarship.
6. Review and approve the chapter **Annual Reports**. Be sure they are in agreement and that the information is correct. **The deadline is March 10th** for Maryland State Chapter to receive these reports.
7. Schedule the **Audit Committee Report** for approval by the chapter.
8. Remind corresponding secretary to **report the newly installed officers as well as the convention delegates and alternates on the International website.** (*If your chapter has a delegate to CIC, remember to report the delegate and alternate for that convention.*) Note: An officer holds their office until their successor is installed. The secretary is able to update the officer information as required.
9. **Hold an Officer Transition Meeting.** The President's Handout provides additional information and guidance (e.g. available resources on the International website) on this activity.
10. Remind chapter and treasurer of **State convention reservations** deadline per invitation instructions.
11. Remind treasurer and budget/finance committee to **prepare a new budget to present, discuss and vote upon** at an upcoming meeting. You should keep a copy as president as well as the treasurer.
12. Remind the Recording Secretary to either 1) send the state organizer the **local chapter Bylaw and Standing Rules** if they have changed or 2) a note/email that they have not changed.
13. Note: The Corresponding Secretary and the Treasurer are not officially released from their offices until they have received their release letters from the MSC Secretary and Treasurer, respectively.

### April

1. Convention delegates should have copies of the proposed state bylaw changes which were sent to chapter and become aware of voting procedures for convention.

### April/May

1. Convention report should be given by delegates at the first meeting following convention. It is essential that delegates accurately report the disposition of any proposed amendments as part of this report.

### May-September

*(consult your chapter bylaws for your particular scheduling)*

1. **Yearbook** committee finalizes yearbooks. (Requirements are available on [peomaryland.org](http://peomaryland.org))
2. Corresponding Secretary sends a **copy of chapter yearbook individually to each state officer by September 15.**  
Chapters will **now have flexibility in providing copies of their yearbooks** by:
  - Sending a hardcopy of their yearbooks to the 5 board members (current method) OR
  - Sending 1 hardcopy of their yearbook to the secretary and emailing a softcopy to the other 4 board members (NEW method)
  - Either way, the secretary receives a HARD COPY and the YEARBOOK Evaluation Form
3. The yearbook chair needs to fill out **chapter yearbook self-evaluation form** found on Maryland P.E.O. webpage and send to State Secretary.

4. Per the information in the yearbook, remind the corresponding secretary to update the information using online forms for your **Membership Chair and Technology Contact** (Report of Election of Local Officers) and the **Project Chairs** (Local Chapter Report of Project Chair). It is important that this is kept current.

### August

1. **Recommendations for STAR candidates begin August 15<sup>th</sup>.**
2. The **online nominations for P.E.O. Scholar Awards begin on August 20<sup>th</sup>.**

### September

1. The chapter will receive a letter about making a voluntary chapter **Seaboard Suite donation**. The donation is voted upon, and if approved, sent per the instructions in the letter.
2. Fall Luncheon information should be received and reviewed with chapter and reservations sent to hostess chapter point of contact by stated deadline.
3. Review your chapters plans for Fall Luncheon to attend, fundraise, invite guests to join them, etc.
4. Remind Chapter Project Chairs to provide chapter committee reports from the information provided by the State Project Adviser and the State Project Chairs.
5. Remind Chapter Membership Chairs to provide chapter committee reports from information received from International, the State Membership Adviser and Regional Membership Reps and giving reports at meetings.

### October-November

1. October is **Let's Go Find the Others Month**
2. Chapters should finalize their plans to participate in **Fall Luncheon**.
3. Chapter should discuss project donations and decide on which projects and amounts will be donated. It is extremely helpful for the State Treasurer to receive all Chapter Project donations by the end of January (recognition program donations **must** be received by then) or very beginning of February at the latest.
4. Chapter **recommendations for STAR candidates ends on October 15<sup>th</sup>.**
5. Online **nominations for P.E.O. Scholar Awards end on November 20<sup>th</sup>.**

### November/December

1. Remind members that only donations paid directly to the International Foundation are tax deductible. There is a form available on the International website which provides very clear instructions on how to do this, and it can be done online. **Donations made to or through the chapter ARE NOT tax deductible.**
2. Corresponding secretary should read and return recommendation for the State Board to State Nominating Chair. Chapters should respond to the Nominating Committee Chair even if no nominations are made.
3. Corresponding secretary reads **letter sent by State A&R chair** and follows directions for acknowledging.
4. Per your chapter's practices, the Treasurer should remind members that she is collecting dues. Dues are due by February 28-29.
5. Remind chapter bylaws committee to review and recommend changes to the State Bylaws, if needed. Proposed changes to Maryland Bylaws and Standing Rules are due December 15.

### January

1. January 21<sup>st</sup> is **Founder's Day, Wear Your Pin Day and Phone Every One Day.**

2. Appoint nominating committee (can be done earlier). It may be helpful to have a past chapter president serve as a member of the nominating committee.
3. Review / finalize any project donations for chapter vote and send to State Treasurer
  - a. Lump sum donations (\$500 or more) to **participate in a recognition program for the current year are due by January 31<sup>st</sup> to the Maryland State Treasurer.**
4. Remind corresponding secretary to send in information on chapter **Golden Girls** to State Secretary.
5. Assure that all information to date for **Celebration of Life** for deceased members has been sent to State Secretary.
6. Make sure you, the treasurer and the corresponding secretary are familiarizing yourselves with the online annual reporting process.

## February

1. Coordinate with the treasurer on the **dues status**. Determine if other chapter sisters can assist. **Dues are due February 28/29**. Non-payment will result in a sister going **inactive**.
2. Coordinate with the nominating committee on **officer nomination status**. Chair may give committee report.
3. At the first meeting in February, read the **"President's Letter"** on the condition and activities of the chapter for approval. Chapter votes to approve. Send copies to non-resident members, the state president, vice president and organizer. If possible, send it electronically.
4. Remind auditing committee that an audit needs to be done in March and the **Report of the Audit Committee should be presented and voted on at March/April meeting**.
5. Remind treasurer and corresponding secretary of end-of-year reports. Annual Reports should not be completed until all dues have been collected and membership numbers are finalized.
6. **The treasurer's books formally close for the P.E.O. year on February 28<sup>th</sup>/29<sup>th</sup>**. The treasurer's last check prior to closing the books will be the dues, fees and assessment check paid to state chapter and is dated February 28<sup>th</sup>/29<sup>th</sup>.
7. Proposed bylaw changes for State Convention should be read in their entirety at the meeting and acknowledged to State President that they were received and read.
8. Remind officers and other members of the **March Spring Workshop** and send in any required information (e.g. RSVPs)