

**Fulfilling**

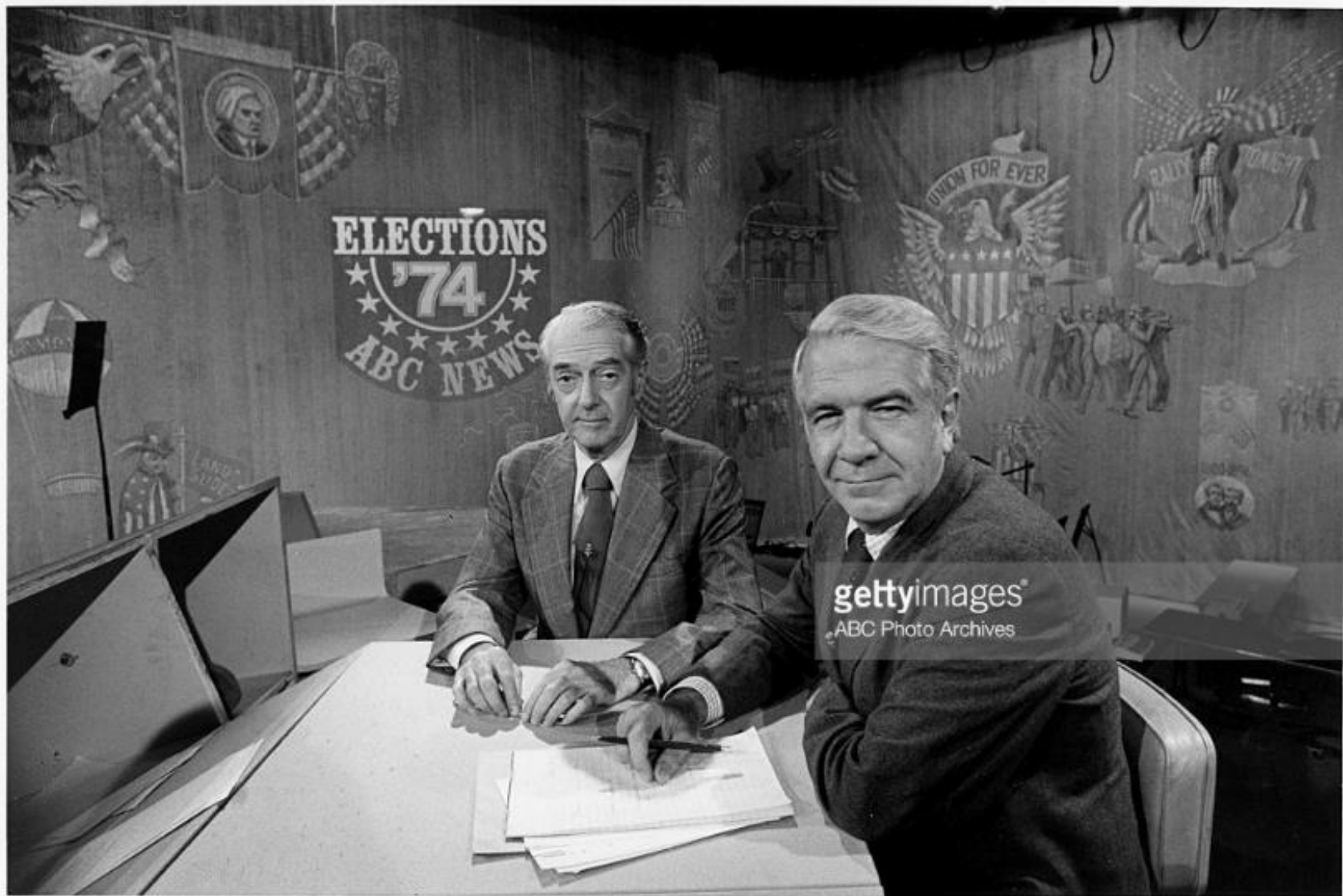


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**“The Toss and Run”**





**“The Drop and Run”**



**“The Pile and Run”**

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# **Local Chapter Officer Transitioning and Goal Setting**

**2016 Convention of Ohio State Chapter  
Xavier University  
Cincinnati, Ohio  
June 3-5, 2016**

**Period of Instruction**

**By the end of this session you will know how to:**

- 1. Conduct the yearly Officers' Transition Meeting**
- 2. Develop chapter goals using the S.M.A.R.T.I. method**



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# **Local Chapter Officer Transitioning**



**“Model” Chapter Officer Transition Meeting**



## *Our Promises of Leadership*

**March 14, 2016  
Regular Meeting**

**11:30 AM  
Salad Luncheon  
Sisters Q - Z**

**Program: Herbs 101  
Presented by:  
Siebenthaler's Nursery**

**ELECTION AND  
INSTALLATION OF  
OFFICERS**



## *Our Promises of Continuity*

**March 28, 2016  
Social Meeting**

**11:30 AM  
Brown Bag Lunch  
Home of President Sharon**

**Followed by:  
TRANSITION MEETING:  
OUTGOING AND INCOMING  
OFFICERS**





## **“Model” Chapter Officer Transition Meeting**



## OUTLINE OF YEARLY MEETING FOR LOCAL CHAPTER OFFICERS

Please keep in President's Book

Following election, the president calls a meeting of the officers for instruction in their duties. (Constitution, Part III, Article V, Section 1)

### *Introduction*

#### *Check officer supplies*

Each officer should have the following:

- P.E.O. Constitution (current) – not required, but helpful
- List of Supplies (current year)
- Instructions to Officers of Local Chapters
- Local Chapter Bylaws
- Ohio State Chapter Bylaws (found in Proceedings)

Clean House!! Old forms should be destroyed upon receipt of new ones. Check the Retention Record for Local Chapters, Instructions to Officers of Local Chapters, for length of retention of officer materials

*Training* – have out-going officers train new officers  
Watch local chapter online training modules on the International website @ [peointernational.org/Resources](http://peointernational.org/Resources)

#### *Review the meeting procedure from President's Book*

#### *Set Theme and Goals for the year*

Theme for program year

- Potential programs, social schedule
- Set up chapter and/or committee discussion topics

Goals for the year

- Membership Growth – initiate, transfer, reinstate
- Projects – find recipients
- Gifts to projects
- Fundraising

Rev. 2/12



?

**Who should attend the transition meeting?**



**Incoming officers**



**Outgoing officers**



**Officers continuing  
in same office**



**Internet connection and computer access**



Incoming Officers



Outgoing Officers



Officers continuing in  
same office



**Technology Chair**





**“Model” Chapter Officer Transition Meeting**

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Rev. 2/12



**.....What if you find old,  
outdated files???**







**CLEAN HOUSE !!!**



# Local Officer Training Modules



PEO

## Leading With Confidence

Online Training Session  
President/Vice President

Beth Ledbetter & Sue Baker,  
*International Chapter*



PEO

## Recording Secretary

"Words that Count"

Maria Baseggio & Sue Baker  
*International Chapter*

## Corresponding Secretary: Staying in Touch!



PEO

## Money Matter\$

Online Training Session  
Local Chapter Treasurers

Susan Sellers & Kathy Soppe,  
*International Chapter*

## PROCEDURE FOR P.E.O. CHAPTER MEETING

The Procedure for P.E.O. Chapter Meeting shall not be copied in any form except the Opening Ode, Objects and Aims, and official printed copy of Chaplain's opening prayer.

*Italicized instructions under orders of business are supplementary materials and are not classified as part of the official Procedure for a P.E.O. Chapter Meeting.*

### CALL TO ORDER

*In the absence of both president and vice president, see Appendix 3 for procedure.*



1<sup>st</sup> tap of gavel: *Calls meeting to order.*

***Southwest Quadrant Chapters***

**Official Chapter Visits**

***September – November, 2016***

***Northwest Quadrant Chapters***

**Fall Membership Workshop**

***Saturday, October 22, 2016***

**First Presbyterian Church - Bowling Green**

***Southeast Quadrant Chapters***

**Local Chapter Officers Area Workshop**

***Saturday, April 8, 2017***

**David Evangelical Lutheran Church - Canal Winchester**





**Individual officer training**



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**Goal Setting**



# Program Chair



# Membership Chair

**P.E.O. PROJECTS?**

**NEW MEMBERS?**

**EFFICIENT  
MEETINGS?**

**TALK ABOUT P.E.O.?**

**NON-PARTICIPATING  
MEMBERS?**

**FUNDRAISING?**

**COMMUNICATION?**

**SMALL INTEREST GROUPS?**

**BONDS BETWEEN SISTERS?**



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**This year our chapter will**

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# **S. M. A. R. T. I. Goals**

**S**pecific Positive Outcome

**M**easurable

**A**chievable & **A**ccountable

**R**ealistic

**T**ime bounded

**I**nspired

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**Chapter PDQ  
Brainstorming:  
Areas for Goal  
Development**

- 1. Increase our chapter membership**
- 2. Increase knowledge of projects**
- 3. Improve nurturing of our sisters**

P.E.O. OHIO STATE CHAPTER

# S. M. A. R. T. I. Goal Worksheet

CHAPTER/LOCATION \_\_\_\_\_

DATE \_\_\_\_\_

and

e?

*Who will take responsibility?*



# S. M. A. R. T. I. Goal Worksheet

Our chapter needs to grow.

Initiate two new members during this PEO year.

and

Two new members

e?

*Who will take responsibility?*

1. Deb Daisy (Membership)

1. Identify potential members for our chapter

1. Give Franc's List to each member



# Franc's List

*A worksheet to help local chapters identify congenial women to introduce to their chapter sisters.*

## Instructions

Print one worksheet for each member.

Discuss your thoughts. Spend 10-15 minutes sharing how P.E.O. enriches your life.

Give thoughtful consideration to the women you interact with every day. Write their names in the respective areas if you think they might make good P.E.O. sisters.

Discuss the possible ways you can introduce the women on your list to the sisters in your chapter.

Ask each sister to be responsible for introducing the women on her list to chapter sisters.

Most of all... have fun!

## Personal Reflection

When thinking about my circles of influence in the following areas, these are the names of women who would be valuable members of our chapter and the entire P.E.O. Sisterhood:

Friends \_\_\_\_\_

\_\_\_\_\_

Relatives \_\_\_\_\_

\_\_\_\_\_

Acquaintances \_\_\_\_\_

\_\_\_\_\_

Neighbors \_\_\_\_\_

\_\_\_\_\_

Children's friends \_\_\_\_\_

\_\_\_\_\_

## Chapter Discussion

How does P.E.O. enrich your life? \_\_\_\_\_

\_\_\_\_\_

Take 5-10 minutes to brainstorm the best way to introduce these women to your chapter. Ideas may include a BBQ, wine and cheese party, style show, chapter tea, girl's night out (spa or movie night at a member's house) or other social event.

Ideas:

Date and Time:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

*"The convention rose in a body to greet our founder, Mrs. Franc Roads Elliott, as she came to the platform. Mrs. Elliott spoke on the theme of how we may get the most service into our lives. She pleaded that P.E.O.s should ever keep their eyes forward, to note the possibilities of the future rather than dwell on the achievements of the past."*

*Source: 1921 report of Convention of Supreme Chapter, P.E.O. Record, November 1921.*

P.E.O. OHIO STATE CHAPTER

# S. M. A. R. T. I. Goal Worksheet

CHAPTER/LOCATION PDQ-Ohio

DATE April 11, 2016

Our chapter needs to grow.

Initiate two new members during this PEO year.

and

Two new members

e?

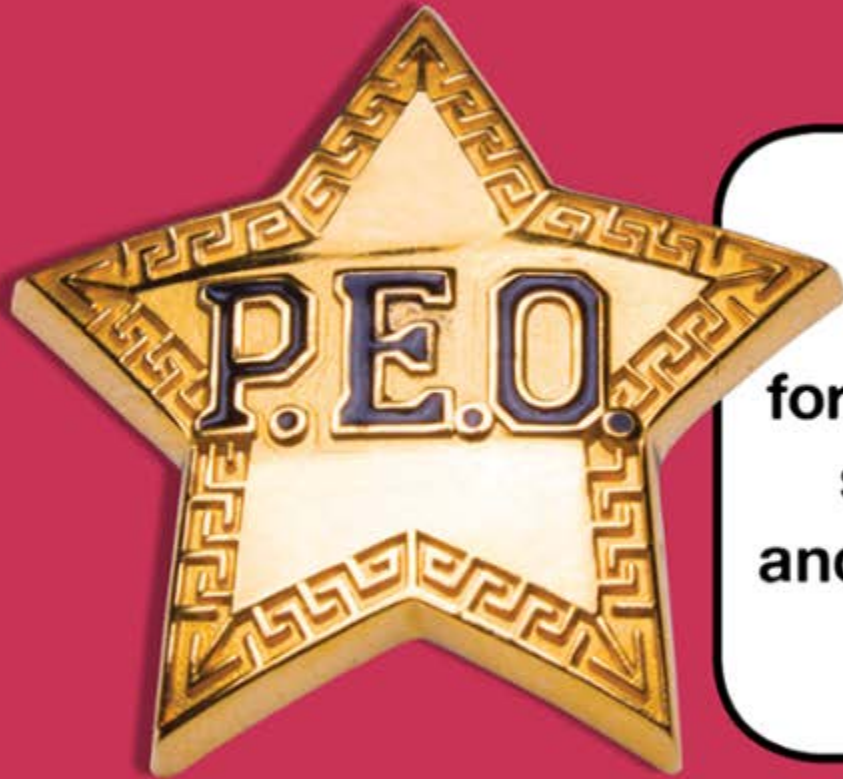
*Who will take responsibility?*

1. Deb Daisy (Membership)
2. Starr Light

1. Identify potential members for our chapter
2. Find a way to introduce PEO to our friends

1. Give Franc's List to each member
2. Learn the PEO Elevator Speech

# The P.E.O. Elevator Speech



**P.E.O. provides educational opportunities for women. We do this by offering scholarships, grants, awards and loans to help women enhance their lives through learning.**



P.E.O. OHIO STATE CHAPTER

# S. M. A. R. T. I. Goal Worksheet

CHAPTER/LOCATION PDQ-Ohio

DATE April 11, 2016

Our chapter needs to grow.

Treat ourselves with dessert  
after each completed tactic

Initiate two new members during this PEO year.

and

Two new members

e?

*Who will take responsibility?*

1. Deb Daisy (Membership)
2. Starr Light
3. Dana Flowers (Social)

Adding 2 members is  
realistic and shows real  
progress for our chapter

By February, 2017

1. Identify potential members for our chapter
2. Find a way to introduce PEO to our friends
3. Invite friends to socials and/or small groups

1. Give Franc's List to each member
2. Learn the PEO Elevator Speech
3. Set up one social and two small group activities

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# **Local Chapter Officer Transitioning and Goal Setting**



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