

**Title: Fulfilling A Sister's Promise**

\*SLIDE 1: "*Fulfilling a Sister's Promise*"

Thank you, Madam President.

Good morning and welcome to this year's Period of Instruction: "Fulfilling A Sister's Promise"!

At this time you could put your handouts aside. You will see them on the screen as we go. I just wanted to be sure everyone received the handouts.

\*SLIDE 2: "*Presidential Inauguration*"

Perhaps you will recognize this scene...Inauguration Day. An institution of our country every 4 years. Before we meet again for state convention, our nation will have elected and inaugurated our next president. He or she will be brand new to the job. As such, there will be transitions into our new President's term of office.

\*SLIDE 3: "*Walter Cronkite*"

When I was a child, this man, taught me that one of the greatest characteristics of the American republic is the smooth transition of power from one presidency to the next.

\*SLIDE 4: "*Harry Reasoner and Howard K. Smith*"

When I was a newlywed, these men told me the same thing.

\*SLIDE 5: "*Diane Sawyer*"

And then she said it...

\*SLIDE 6: "*Bret Baier*"

And now he is saying it...

\*SLIDE 7: "*Presidential Inauguration*"

Every time a newly elected President takes office, the transition takes place. From the bottom up, predecessors train successors. Files are reorganized. Offices are emptied and then filled again and new priorities are established.

Now, think about your experiences each time you have said “yes” to a new P.E.O. chapter officer. Did your officer transition look something like this?

\*SLIDE 8: “*The Toss & Run*”

OR this?

\*SLIDE 9: “*The Drop & Run*”

OR this?

\*SLIDE 10: “*The Pile & Run*”

Maybe??? But I really hope not!!!

\*SLIDE 11: “*Fulfilling A Sister’s Promise: Local Chapter Officer Transitioning and Chapter Goal Setting*”

This full title of this Period of Instruction is: Fulfilling a Sister’s Promise: Local Chapter Officer Transitioning and Goal Setting. Indeed, our sisterhood is rich with traditions and procedures that have been passed along for nearly 150 years. In Lyn’s devotion this morning she reflected on the vows we take as officers. We promise “to exercise our abilities to the utmost, perform every duty conscientiously, to act with precision and promptness, to become familiar with P.E.O. laws and ceremonies, and to serve faithfully.” Within those vows is the promise to promote the transition of chapter leadership.

\*SLIDE 12: “*Period of Instruction Goals*”

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

1. Conduct the yearly Officers’ Transition Meeting
2. Develop chapter goals using the SMARTI method

\*SLIDE 13: “*Local Chapter Officer Transitioning*”

Just like the smooth transition of leadership in the capitol, the smooth transition of leadership in your local chapter can be one of its greatest strengths, too. Helping each officer discover the resources available to her, mentoring her into her responsibilities and developing attainable goals for your chapter will strengthen your chapter and help you fulfill your promises. Also, by ensuring a smooth transition from one officer to the next, you will be protecting the value of all the hard work you put into your position during your term...and the legacy you leave behind.

*\*SLIDE 14: “Model Chapter”*

Today, we are going to look at how a “model” chapter handles its officer transitions, through thoughtfulness, preparation and follow-through. Let’s call our model chapter PDQ.” They did a wonderful job at LCOAW this year demonstrating efficient chapter meeting procedure!

*\*SLIDE 15: “Yearbook Pages”*

The most important event for ensuring a smooth transition is the Officer Transition Meeting. Chapter PDQ schedules this meeting far in advance and includes the meeting date and details in its yearbook. As you can see, PDQ holds two meetings in March. The first meeting is the regular business meeting with the election and installation of new officers. The second meeting is social. Following the brown bag luncheon, the incoming and outgoing officers meet and carry out the bulk of the transition.

*\*SLIDE 16: “Model Chapter Photo”*

Let’s see how Chapter PDQ was able to make the most of this important meeting, and as such, was able to get their new P.E.O. year off to a powerful start.

*\*SLIDE 17: “Outline of Yearly Meeting”*

This is the “Outline of Yearly Meeting for Local Chapter Officers.” It is one of the handouts the tellers passed out. Yours looks different from the one on screen because it’s not in color. You can download this resource from the P.E.O. International website. You’ll see at the top of the page that it’s to be kept in the President’s Book. And the Constitutional reference to hold this meeting is also noted. (*Constitution, Part III, Article V, Section 1*) A difference between your handout and the website’s is that I added Ohio’s Bylaws and Standing Rules (in the Proceedings) as an important resource. If you are not your current chapter president please give this outline to your president when you return home and share information from this Period of Instruction with her.

*\*SLIDE 18: “Who Should Attend This Meeting?”*

Chapter PDQ hosted all \*incoming and \*outgoing officers. In addition, they hosted all incumbent officers who were \*continuing on to another term. These officers are “repeaters,” and while they won’t need to personally transition or train, they will play several very important roles at the Officer Transition Meeting. Not only can they serve as excellent resources for incoming officers, they can also serve as a seasoned sounding board as the new officers chart the course for the coming year. In addition to the “repeaters,” there are other sisters who can be helpful at this meeting, too, and I’ll discuss those as we continue through the Outline of the Yearly Meeting.

**\*SLIDE 19: “Where Should the Meeting Be?”**

Although not required, Chapter PDQ held its meeting in a location with a good internet connection and computer access. They made heavy use of both the International and state P.E.O. websites during the Officer Transition Meeting...making sure that everyone knew how to access the websites, how to log-in and how to access critical resources that they would need in the future.

**SLIDE 20: “Officers Adding Tech Chair”**

Chapter PDQ also had their **\*Technology Chair** at this meeting. If you have an officer who is not comfortable with technology or does not have access, your Tech Chair should be the one to make sure this officer has all the forms, instructions and information she needs. Not being tech savvy should never prevent a sister from taking an office. The chapter’s Technology Chair can ensure that technological hurdles do not trip up your new officers before they even have a chance to start moving ahead.

**\*SLIDE 21: “Model Chapter Photo”**

Here again is Chapter PDQ holding their Officer Transition Meeting. All of the key Sisters are in attendance and they have all the resources they will need within arm’s reach. Here again is the “*Outline of Yearly Meeting for Local Chapter Officers*” to see the resources they have and what they will do.

**\*SLIDE 22: “Outline of Yearly Meeting”**

Chapter PDQ has a copy of the P.E.O. Constitution, Ohio’s bylaws and Standing Rules (found in The Proceedings) and their local chapter bylaws. Each incoming officer has the section of the Instructions to Officers of Local Chapters (IOLC) pertaining to her office. Because of the way the procedures of the President, Recording Secretary, Corresponding Secretary and Treasurer interrelate, it is important to review the IOLC Retention Records and procedures together. A review of the List of Supplies should also be part of this agenda.

It would be so great and loving if the outgoing officer brought organized files for the incoming...making sure she has just those items listed on the Retention Record and Supply List...no old, outdated forms left in the file.

**SLIDE 23: “Out Dated Files”**

But, Madam President, even our model Chapter PDQ wasn’t perfect. At the Officer Transition Meeting, some PDQ officers found a **\*few** old, outdated files. But that’s OK, because PDQ used this meeting to...

SLIDE 24: “Clean House”

\*Clean House!

Cleaning House at the Officer Transition Meeting not only ensured that the files were organized and up-to-date... it allowed the incoming officers to acquaint themselves with the contents and organization of those files. As such, their jobs will be much easier in the long run.

\*SLIDE 25: “Training Modules”

In the time Chapter PDQ spent together on the P.E.O. International website they browsed through the training materials and modules available for President/Vice President, Recording Secretary, Corresponding Secretary and Treasurer. Later, at home, they were each able to view the training module for their own office since they already knew exactly where they were. They were also able to download and print their own modules for future reference. If one of your officers does not use the computer....this is a job for your Tech chair! She'll learn who will be depending on her when she's included in this officer transition meeting.

\*SLIDE 26: “President’s Book”

Next, the outgoing President spent some time going over the Procedure for P.E.O. Chapter Meeting. This helped each incoming officer understand her duties and responsibilities for each meeting. Taking this opportunity to review the President’s Book will likely increase the efficiency of your chapter meetings.

\*SLIDE 27: “Quadrant Event/Dates”

Also at this time, be sure the officers are aware of any important upcoming dates related to the chapter.

\***Southwest Quadrant Chapters** will receive an Official Visit this fall. Chapter presidents received the initial confirmation of the Official Visit date by email on March 1st. In a few days, the chapter presidents will receive another email from the visiting officer with more information. And this year we have a checklist for each local chapter officer to complete for the officers conference. These forms will be available on the Ohio P.E.O. website under Chapter Resources>Official Visits.

\*The Fall Membership Workshop will be held in Bowling Green on October 22nd for all chapters in the **Northwest Quadrant**. Delegates, you received either an orange or yellow flyer for this event in your delegate packet.

**\*Southeast Quadrant Chapters** will attend LCOAW (Local Chapter Officer Area Workshop) on April 8, 2017 in Canal Winchester. Delegates, you received either a blue or green flyer for this event in your delegate packet.

**\*SLIDE 28**: *“Two at Computer”*

Next, PDQ broke into pairs... each incoming officer working one-on-one with her outgoing counterpart. You can see this time scheduled on your handout. This time is particularly important for the **recordkeeping officers** (recording secretary, corresponding secretary and treasurer) and of course, a new president. To make the best use of each person’s time, this pairing could happen at the very end of the meeting, after all the group discussion, or the officers could meet together another time.

**\*SLIDE 29**: *“Outline of Yearly Meeting”*

After spending the time learning about resources and general officer training, it will then be time to set chapter goals for the upcoming year. As I mentioned earlier, this may be the last time for outgoing officers to truly impact the future of their chapter....and to cement their legacy of leadership for years to come.

**\*SLIDE 30**: *“Goal Setting”*

The goal-setting process should start with an honest discussion about the current state of your chapter. What are your chapter’s strengths? Do you face particular challenges? What would you like to improve? Do more of? What do you love about your chapter that you would like the new officers to maintain?

**\*SLIDE 31**: *“Adding Officers to Meeting”*

Two other chapter members could be very important to the goal setting part of this meeting...the Program Chair and the Membership Chair.

*\*SLIDE 32: “Thought Bubble Topics”*

This discussion can cover any number of topics. Your discussion should focus on specific issues, opportunities and initiatives. For instance, could your chapter be more involved with or more knowledgeable about our P.E.O. projects? Do you need a better way to introduce potential sisters to your chapter and to P.E.O.? Has it been a long time since you initiated a new sister? Would you like to build stronger bonds between sisters? Do you have non-participating members with whom you have lost touch?

(If this is an issue for your chapter please come back to Convention Hall at 2:30 for the workshop *All Present and Accounted for! Engaging All Members of Your Chapter.*)

Is it time to change up your fundraising? How is the communication in your chapter? Are the meetings efficient? Have you ever considered small interest groups?

Your incoming officers will provide their vision, while the outgoing officers can provide wisdom and guidance. Writing goals as a team helps to create buy-in and ownership. Together, you can and should set specific goals for the coming year.

*\*SLIDE 33: “Group think of goals”*

Take this moment and think of an area your chapter might consider as a goal for this year. If your chapter has already set some goals, jot down one of them to share with us now.

(Pause)

Let’s hear a few of examples .....

(Gather 5-6 responses from audience)

Great ideas! Thanks for sharing those.

So now discussion is underway and a few good ideas have taken root...it’s time to direct your thinking toward turning your good ideas into goals....so let’s talk about a tool that can help you organize your thoughts and give accountability to the process.....SMARTI goals.

\*SLIDE 34: “*SMARTI Goal Acronym*”

Last summer, at the 2015 LEAD Conference in Des Moines (Leadership-Education-And-Development) I learned about developing goals using the SMARTI model. In addition to what I am giving you today, you can find out more about the SMARTI model in an article in the current May-June Record. The article is titled *Goals, Strategies and Tactics: The Building Blocks of Leadership* and cites additional resources online at [peoleadership.org](http://peoleadership.org).

OK...Let's go over the SMARTI acronym.

\*A SMARTI GOAL has a **SPECIFIC POSITIVE OUTCOME**.

A specific goal has a much greater chance of being accomplished than a general goal. A general goal would be: “Get in shape.” A specific goal would be “Walk 30 minutes, 5 days a week.”

\*A SMARTI GOAL is **MEASURABLE**.

You establish criteria for measuring progress and attainment. You ask “How many or how much and how will I know it has been attained?”

\*A SMARTI GOAL is **ACHIEVABLE and ACCOUNTABLE**.

You can achieve most any goal when you plan your process wisely. Break the goal into intermediate steps so you are likely to keep within your capabilities. Designate who in the chapter will be accountable for the process.

\*A SMARTI GOAL is **REALISTIC**.

A goal toward which you are both **willing** and **able** to work. A realistic goal represents substantial progress for your chapter. Your goal is probably realistic if you truly believe you can achieve it.

\*A SMARTI GOAL is **TIME BOUNDED**.

A goal should be grounded within a time frame. With no time frame there is no sense of urgency. You want to lose 15 lbs.? By when? “Someday” is not an acceptable time frame. By your daughter's August 1<sup>st</sup> wedding or before you go on that cruise? Or how 'bout (pointing to self) before they put your picture in The Record as state president? Those would be time bounded goals.



\*A SMARTI GOAL is **INSPIRED** by a need or desire.

The **WHY** of the goal. When planning a goal you should start with the **Inspiration**. Then consider the **SMAR** together.

\*SLIDE 35: “Chapter PDQ Goal Development”

Chapter PDQ identified these areas for possible goal development:

1. Our chapter is getting smaller and we need to both preserve and grow our membership.
2. We need to know how to sponsor candidates for more than Ohio Scholarships and STAR.
3. We need to main our bonds with all of our sisters.

\*SLIDE 36: *SMARTI Goal Worksheet*

This is your second hand out. It’s my attempt to make an easy to use worksheet for planning SMARTI goals.

\*SLIDE 37: “*SMARTI Goal Worksheet*”

So let’s take a look at their first SMARTI Goal worksheet:

We begin first with the **Inspiration** for the goal. Why are they motivated to achieve this goal? The chapter is aging. One sister entered Chapter Eternal last year and in a few months Janet will move to Florida and transfer to a chapter there.

What is their desired **Specific Positive Outcome**?

\*Initiating two new members during this P.E.O. year.

Is this goal **Measurable**?

Yes, they are setting their goal at \*two new members.

Is the goal **Achievable and Accountable**? They will make this goal achievable by setting up several separate strategies. The goal will be accountable when they name those who will oversee the implementation of the specific tasks.

Before we continue with the worksheet, let’s talk a moment about **Accountability**. Probably the biggest question to answer when developing goals is: Who will be the “point person” for each goal? Who will organize small group get-togethers? Who will be our Sunshine Gals? Who will execute the newsletter or email after meetings? Especially for you presidents and vice presidents...if you do not answer the accountability question as goals are developed you will soon find yourself doing way too much on your own. Think about your chapter’s committees. How can they be used to achieve some of these goals? Most chapters have a good organization in place to involve many in achieving the ideals and aspirations of our sisterhood.

So let's go back to the worksheet...

The first **Strategy** is to \*identify women who would be good members for their chapter.

The **Tactic** then is to \*give Franc's List to each member. They could make the Franc's List a program or each take the Franc's list home and fill in on their own.

The **Accountable** sister will be \*Deb Daisy, chair of the Membership Committee.

\*SLIDE 38: "*Franc's List*"

Here is the Franc's list found in the Membership Toolbox on the P.E.O. International website.

\*SLIDE 39: "*Adding to PDQ Goal*"

The next **Strategy** is to have an \*effective way to introduce P.E.O. to their friends so they will want to attend a program or social event.

Their **Tactic** is for the chapter to \*learn the P.E.O. Elevator Speech so they will all have a consistent way to introduce P.E.O. to their friends. The sister who will be **Accountable** is Starr Light. She attended CIC last year and learned about the P.E.O. Brand Tool Kit.

(You can learn more about the Brand Tool Kit, by coming back to Convention Hall at 3:20 for the workshop "What's in a Name? Using the P.E.O. Brand Tool Kit.")

\*SLIDE 40: "*Elevator Speech*" (*Brand Tool Kit; International website*)

An Elevator Speech reduces the larger narrative describing P.E.O. into a few sentences...as if there is only enough time for a quick elevator ride. So, the "Elevator Speech" is the perfect tool when asked, "What is P.E.O.?" or "What does P.E.O. stand for?"

\*SLIDE 41: "*Adding to PDQ Goal*"

The third **Strategy** is to \*invite the friends they identified by using *Franc's List* and introduced to P.E.O. by using the *Elevator Speech*, to social meetings or small group get-togethers in order to introduce them more chapter sisters. The Tactic is to \*set up one social and at least two small group activities.

\*Dana Flowers, chair of the Social Committee will take the lead on this on.

Is the goal \***Realistic**? PDQ has confidence that by working together they can add two new members to their chapter. Adding two new members to the chapter represents real progress for Chapter PDQ.

The **\*target date is** by February, 2017 so the new sisters will be included in their 2016-2017 annual report.

And don't forget the **\*Celebrations!** Chapter PDQ will treat themselves with dessert after each completed tactic. Of course, they will need to designate the sister or sisters who will be accountable for the celebrations.

**\*So here is the chapter's goal:** It's Specific, Measurable, Achievable, Realistic and grounded in a Time frame...along with Strategies, Tactics and Accountability.

**\*SLIDE 42:** "*Local Chapter Officer Transitioning and Goal Setting*"

I challenge you to leave behind vague, unfocused, foggy thinking about your chapter's future and get specific. Dream and then break it down into some specific measurable steps that will make your chapter stronger, better or smarter by this time next year.

The beginning of each P.E.O. year is a great opportunity. The chapter president should gather her chapter leaders to prepare for the year ahead. Help each officer learn about her responsibilities and the available materials and resources for her office. Then together...set a few specific and realistic goals for your chapter that will help you fulfill *Our Sister's Promises* and continue to move your chapter forward. Involve and motivate others to contribute to reaching these goals.

**\*SLIDE 43:** "*Happy*"

If your chapter has already held this Transition Meeting and set some goals, I applaud you and wish you much success as you move forward. If your chapter has not yet done this for the coming year, I urge you to have this discussion with your officers or in a chapter Family Meeting and set some direction for the year ahead.

**\*SLIDE 44:** "*Fulfilling A Sister's Promise*"

Your state officers, especially your chapter's board contact officer and your state committee members stand ready to help your chapter attain your goals and *FULFILL A SISTER'S PROMISE*.