

CHAPTER PRESIDENTS LEADERSHIP TRAINING SCRIPT

Good Morning Ladies. Thanks for attending the Leadership Training this morning. This will be a brief overview of your duties with time for questions. I hope you have a copy of the packet of information sent by email.

Chapter presidents are tasked with:

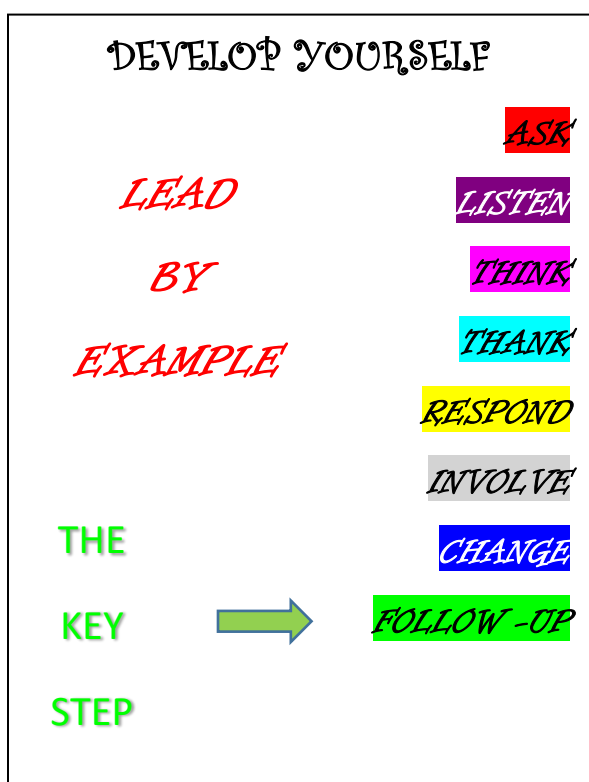
- keeping the chapter meetings running smoothly,
- submitting forms
- appointing committees as needed,
- and guiding officer and committee chairman as they fulfill their duties.

It is your responsibility to be sure that all chapter members are knowledgeable about AΔK.

Through fraternity education and adequate communication you will help assure the chapter has capable leadership available in the future.

Your duties and responsibilities are listed at the top of the form. If you follow these it will help our state president and state officers fulfill their duties as well.

President's Duties and Responsibilities



- Serve as chairman of the executive board and hold a minimum of three executive board meetings per year.
- Plan the agenda and preside at the chapter meetings
- Vote only to break a tie unless the vote is by ballot
- Preside at initiation service ritual
- Maintain a permanent file of all materials pertinent to the office and pass the file on to your successor.
- Appoint all committees except the nominating committee
- Instruct the officers and committee members in the performance of their duties and provide them with the supplies necessary to carry out their duties
- Monitor and guide the activities of officers and committee chairman in the fulfillment of their duties.
- Remind officers and altruistic chair to send in all reports promptly
- Be familiar with the types of membership status and forms
- Ask secretary to send the chapter minutes and/or chapter newsletter to the Kansas President before the end of each month
- Be familiar with state goals sent out in June newsletter
- **READ ALL NEWSLETTERS**

TIP: In appointing or asking for volunteers to fill committee positions, you should avoid using the same people, but have all the members involved as they are able. You should be able to describe in detail the duties of the committee. If you don't know the responsibilities of each chapter office and/or committee chair they can be found on the international website. Quick link/documents and forms/guiding and general/handbook/pages 13-16

Make sure to include the new members as you transition into the fall meetings.

ORGANIZATION

Organization is key. I know some of you are already planning agendas for the coming year with your president-elect/vice president and members to find programs that no one wants to miss. It is your biennium. Don't be afraid to bring in new ideas and mix things up. Be sure to include all meeting information in your yearbook and send it to Cheryl by October 1.

Covid has changed things. It is important to continue to meet monthly in some way. Consider Zoom or Go to Meeting applications or use phone trees and email to get members involved each month. Select large meeting places so members can social distance and encourage members to wear masks. I am hoping that in a pinch, members can vote or respond to emails and count those who respond as attendees of the monthly meeting. Have a group of executive board members call all members on one day and count those phone calls as attendance to the meeting. Use conference calling as a way to connect. Make sure you keep a record of the attendees and write minutes for the meeting. The secretary will need this information to complete the H-114 in June 2021. Think outside the box...but have monthly meetings.

Items to be included in your yearbook may include:

- International officer information
- State Officers and Chair information
- Chapter Officers and Chair information
- Chapter member information
- programs and speakers
- altruistic projects
- venues/meeting locations
- hostesses for the year
- policies and procedures
- phone tree information
- information specific to your chapter – past presidents, omega sisters etc., scholarships etc.
- executive board meeting dates [minimum of 3]



According to International guidelines, each chapter executive board should meet a minimum of 3 times per year.

On the next page is a form that Rho chapter uses for its first executive board meeting in the summer. You don't have to use a form like this, but it does let your officers know their responsibilities for this time of year. On the next page is a generic copy of their form.

EXECUTIVE BOARD MEETING PLANNING SUMMER 2020 ITEMS

Date:

Time:

Facilitator: Executive Board—

Board members:

When	Item	Who	√ Done
JUNE 30	H-114 Chapter Highlights		
JUNE 30	C1 -Form		
Summer	BANK visit- change signatures....order checks <ul style="list-style-type: none"> • Bring...Letter from chapter showing sig changes • Bring...Copy of chapter minutes showing vote of new officers. • Check for new bank needs 	P/PE/T/PP contact bank	
Summer	PRINT for AUG meet...Rosters/Calendar [old and blank new]/ P&P/ Budget [old & blank]/ Chapter Needs Assessment [CNA] / Member Needs / ByLaws.Statement / New Member Referrals		
Summer	EX-Board: <ul style="list-style-type: none"> • Chapter Roster to KS Pres....H-107 • AUDIT-BUDGET—C1 done/ Bud..appro keep • Preplan Calendar • Policies & Procedures Review—Send to Board • Look at H-114 form—sent via email by secretary • Chapter Needs Assessment [due 8/31] • C1 Form- Due 6/30--- • Ch ByLaws Policy Statement sent to state bylaws chair P+ T... 		
JULY 30	IRS ePostcard 990	Treasurer	
AUG	Packet for members: <ul style="list-style-type: none"> • Roster/ Calendar [Program]/ P& P / Budget / CNA/Member Needs / New Prospects Officer/Cmtee Packet: Info on duties/ due dates [next page] Notebook Contents [if used]: <ul style="list-style-type: none"> • Covers / P& P/ Roster/ Program/ Budget / • Calendar of due dates / Officer-Cmtee names and short description of roles 		
TBD-Early Aug or Sept	Ceremonies— <ul style="list-style-type: none"> • Installation • Initiation • Re-Instatement 		

Keep yourself organized by keeping a NOTEBOOK of all pertinent information at hand



- Use a brightly colored 2" to 3" binder
- Use multiple tabbed dividers
- If your chapter doesn't have a president notebook, consider passing along the one you create to the next president

I have found that if you don't keep everything together you can lose important information.

Sample Table of Contents for Notebook:

- Copies of the chapter meeting agendas, minutes and newsletter if you use one
 - TIP...could organize several topics by months.
- Chapter standing rules or policies and procedures (many chapters include these in the yearbooks)
- Forms from International Headquarters such as **Official Policy Statement** to be placed in front of the chapter's policies and procedures. This form was sent to the past or current state president after the state convention in May 2020. You and your treasurer will sign it. Cheryl and Nancy Warren, Bylaws chair, will tell you more about it in a newsletter or email.
 - TIP-can also include forms in the month tab where they will be due.
- Chapter Officers' Calendar
 - Also include any specific action items on the month's agenda
- Communications received
 - from: State President, State VP of Membership, Regional representatives, etc
 - Forms of newsletters, emails, handouts, etc.
 - Be on the look out for the following information in June's State Newsletter:
 - State themes/goals/logos
 - Contact information for:
 - State executive board

- TIP May want to use plastic sleeves for some of these items
 - Handout materials, such as membership handouts, from Headquarters
 - Handouts, brochures etc. obtained at district, state, regional, and international meetings.
 - Your own state president may want you to keep other information pertinent to your specific state.

We are now looking at planning for each meeting.

Plan ahead for each meeting:



- It is imperative you read all International (E-Blasts), regional and state newsletters or other correspondence before the meeting and mark all passages which must be read or summarized at the chapter meeting.
- Study the minutes of the previous meeting since there could be old business to review.
- After reading all correspondence and previous minutes, prepare an agenda.
- Start meeting on time. Use a meeting plan of 20/20/20 or 30/30/30 minutes. The 3 periods would include social/program/business meeting in no particular order.
- When presiding, try to be tactful and keep a sense of humor.
- Be familiar with the basic rules of parliamentary procedures.
- When a treasurer's report is given, the president states the treasurer's report will be filed for audit. At the end of the year a committee should be appointed to audit the Treasurer's report.
- A good president gives proper recognition to all members throughout the year. This could include the new Violet designation for 10 year members, and silver, sapphire, golden, diamond or platinum sisters. If they earn an award share it with chapter members and with the state president.
- Involve all members in the chapter as you transition into the fall meetings. Be sure to include newly initiated members to keep them engaged from the start.
- Give special attention to guests and new members so they will feel a part of the chapter. Assign a mentor to answer any questions they might have.

To the right is a sample agenda but I have included a generic agenda which is used by Rho Chapter. A generic copy of her agenda begins on the next page. I am a firm believer in not reinventing the wheel.

Kansas (Chapter) of Alpha Delta Kappa

You May have social time and or program presented before or after your business meeting.

Call to Order
Agenda – motion for acceptance
Thought for the Day
Reading of the Minutes
Treasurer's Report
Officer Reports
Committee Chairman Reports
Old Business
New Business
Motion to Adjourn
Singing of *The Lamp of AΔK*

GENERIC AGENDA FOR CHAPTERS

This form is used by Pres, Sec and anyone else who wants to take notes.

Alpha Delta Kappa / ???? Chapter Meeting Agenda 2020-2022

Meeting Date _____ Place _____ Hostess _____

1. Welcome—**Pres**
2. If you don't have a Chaplin—**Each Hostess will do- THOUGHT FOR THE DAY**
3. Roll Call—, **Sec Number Present #** _____ [Member....Full / Limited / Life]
Names of each member can be underlined as present

Initiates: _____

4. Minutes Approved **Sec**
5. Correspondence and Courtesy- **Sec**
6. Financial Report- **Treasurer** Balance _____
Bills _____
7. Executive Board Report—[Pres, Past Pres, Pres Elect, Treasurer]

8. Committee Reports:

Altruistic
Budget & Audit **Past Treas.**
ByLaws
Pledge/Membership—**Past Pres...**
Program/Yearbook—**Past Pres...**
Fraternity Education-**Chair**
ADK Month-**Chair**
World of Understanding - **Chair**
Nominating—**Pres..**
Ways and Means-**Treas..**

Special Committees:

- Pearl—**President**
- **Summit Meeting/ State Meeting**
- **Other**

Historian – if you don't have one make sure you take pictures to be shared on your Facebook Page

9. Unfinished Business—
10. New Business—NEW IDEA—
11. Announcements---

Communication

As stated in your packet. The key to any successful biennium is Communication. Be sure to follow the basic principles listed.

The key to any successful biennium is Communication with:

- Chapter members through the yearbook, emails and meeting minutes

Since some members won't be able to attend, make sure your agenda and minutes of the monthly meetings are sent all chapter members to keep them informed. Use email and US mail if necessary. Also be sure you or your chapter secretary send minutes to the Cheryl before the end of the month! I can't stress this enough.

- Follow up with chapter committee chairman to see they are fulfilling their duties and responsibilities

Make sure you go over deadlines for forms and scholarships.

- State officers and committee chairs newsletters and/or emails

- International E-Blasts and Website

- Updating the chapter directory on the International Website

- Communication with International and updating the directory on the International website is imperative.
- Any changes in status or personal information to the chapter membership should be completed online on the ADK Website either by you, your treasurer or chapter membership chairman or individual member.

International headquarters, regional and state officers use addresses for mailings such as the Kappan and email for E-Blasts and newsletters.

If your chapter information is correct, you are saving real dollars in postage. Omega lists, resignations, name, address and phone number changes, and status changes are noted and then lists are generated by International headquarters staff and disseminated to the state officers.

Chapter Officer's Packet should be arriving in July or August. This packet can also be found on the international website. Be sure to disseminate forms immediately.

Your Treasurer will receive a separate email from headquarters. One of the forms she will receive is the H-138 Members Payment Record which is specific to your chapter. This form lists all chapter members, their initiation date and the charter date of your chapter after the line that shows Chapter ITE payment. Ask for a copy of this form to help you determine who qualifies for sister designations. You will need the charter date for the Official Policy Statement form.

Use the **Officer's Calendar** on the next page to help with upcoming agenda items. This calendar is specific to chapter needs and doesn't list state and international requirements. It also begins when your presidency begins not in January. Forms are in bold type and scholarships are underlined.

CHAPTER OFFICERS' CALENDAR

FORMS TO BE SUBMITTED ARE BOLDED; SCHOLARSHIPS ARE UNDERLINED

	EVERY YEAR	ODD YEAR	EVEN YEAR
July	Officer Packet emailed from headquarters	International Convention Attendance	Regional Conference Attendance (June or July)
August	8/31 Chapter Needs Assessment (CNA) Due – fill out online with membership chairman 8/31 Apply for Distinguished Program Award on line Chapter treasurer's packets emailed from headquarters		
September	<u>9/15 Classroom Grant Deadline – encourage members to apply</u>		World Understanding Project Proposals deadline
October	ALPHA DELTA KAPPA MONTH 10/1 Chapter yearbook deadline – send to state/nation president <u>10/15 Regional Mini-Scholarship Deadline – encourage members to apply</u> 10/15 Chapter treasurer's 990-N IRS E Postcard Deadline – make sure this is sent		10/1 ITE Weekend reservation deadline 10/15 Proposed International Resolutions and International Bylaws Amendments deadline – chapters can submit changes
November	<u>11/15 Innovation Grant Deadline – this is for non-members – encourage other teachers to apply; great way to advertise AΔK</u>	11/1 Excellence in Education Award Nomination Deadline – If you have an outstanding educator in your chapter nominate her for this award	ITE WEEKEND in Kansas City 11/1 Candidates for International Office Application Deadline – ONLY THOSE MEMBERS WHICH MEET SPECIFIC REQUIREMENTS CAN APPLY
December	No Deadlines		
January	<u>1/1 Treasurer: International Dues H- 138 Deadline make sure this is sent in</u> 1/1 Membership Campaign Begins 1/31 <u>Regional Professional Development Scholarship Deadline – encourage members to apply</u> 1/31 Dues Postmark Deadline or incur \$5 per member penalty/late fee		
February	Chapter Altruistic Chairman should have altruistic information from chapter members to complete her report <u>2/15 ARGO Agnes Robertson Global Outreach Scholarship – encourage members to apply</u> <u>2/15 Fine Arts Grant – encourage members to apply</u>		
March	3/15 Chapter Altruistic Report is due to S/P/N Altruistic Chair – be sure this is sent	3/15 Chapter Bylaws or Policies and Procedures Official Policy Statement due to S/P/N Bylaws Chairman	
April	<u>4/15 Regional Mini-Scholarship Application Deadline – encourage members to apply</u> 4/30 Membership Campaign Ends	Register for International Convention	Register for Regional Conference 4/15 International Altruistic Project Proposals Deadline
May	5/1 Automatic suspension on May 1 for non-payment of dues		5/1 H-107 Report of Chapter Officers for the next biennium
June	6/30 Chapter Secretary submit H-114 Annual Chapter Highlights form 6/30 Chapter Treasurer submit C-1 Annual Chapter Reporting form		

Next is a handy **checklist of forms**. Please make sure you, your officers and chairs are meeting all the paperwork requirements.

In the textbox below there are 5 ways listed to earn a pearl, but two pearls can be earned by 1 member attending a regional or international convention and the other by initiating a new member in the year.

Become familiar with the FORMS that are required to be sent to headquarters or state chair and check to see that they are completed on time: (those bolded earn the chapter a pearl)

President/Membership Chair:

- **8/31 Chapter Needs Assessment form (CNA)**
- ANY TIME: H-103 Membership Application and/or H-154 Reinstatement Forms
- 5/1 Even Years H-107 Report of Chapter Officers
- After H-107 sent in, check with officers and chairs to be sure files are passed along to the new officers and committee chairs.

Treasurer:

- 6/30 C-1 Annual Chapter Reporting form
- **10/15 990-N IRS E Postcard**
- **1/1 H-138 International Dues**

Secretary:

- **6/30 H-114 Annual Chapter Highlights form**
- Send the chapter yearbook to the state president by October 1
- Send minutes to state president before the end of the month for possible inclusion of information in her newsletter

Chapter Altruistic Chair:

- gathers information on members altruistic gifts by February 28 of each year
- completes Chapter Altruistic Report in early March
- **3/15 Chapter Altruistic Report** sent to state altruistic Chair

Another important duty is to inform members of the **scholarship opportunities** at the state, region and international levels and encourage members to apply for scholarships and grants. The form on the next page begins in September not January. Your scholarship or fraternity ed chairman could explain these to the membership.

Become familiar with the scholarships that are available to members and non-members, promote them a month or two before the deadline and encourage members to apply.

- Classroom Grant
- Regional Mini-Scholarship activities between Nov 15 and May 15
- Excellence in Education Nomination Form
- Innovation Grant
- EiE Awards
- Regional Professional Development Scholarship
- Fine Arts Grant
- Agnes Robertson Global Outreach Scholarship (ARGO)
- Regional Mini-Scholarship activities between May 15 and Nov 15

SCHOLARSHIPS AVAILABLE FOR MEMBERS AND NON-MEMBERS

DEADLINE	SCHOLARSHIP NAME	PURPOSE	WHO IS ELIGIBLE	AMOUNT OF AWARD
September 15	<u>Classroom Grant</u>	To assist excellent member educators to enhance classroom lessons.	MEMBERS engaged in innovative teaching practices.	\$2,000 limit per region at \$400 per grant awarded. Up to five awards for seven regions.
October 15	<u>Regional Mini-Scholarships</u> (For activities taking place between Nov 15-May 15)	For Non-Alpha Delta Kappa-sponsored conferences, classes or workshops.	MEMBERS engaged in education or retired from education	\$1,500 per region, with up to \$500 per scholarship
November 1 Odd-numbered year only	<u>Excellence in Education (EiE) award Nomination Form</u> Nomination required by a colleague/chapter member or parent	Nomination Form required for educator to receive invitation to complete online application. Application Packet due January 15 of even-numbered year.	MEMBERS engaged in education and under contract in teaching, administration or some specialized field of education. Past recipients at the regional level not eligible to be nominated again.	Awards at the S/P/N, Regional and International for recipients at each level. See Excellence in Education awards, above, for January 15 EiE award information.
November 15	<u>Innovation Grant</u> Recommendation by a member required NON-MEMBERS ONLY	To assist creative, innovative educators with cost of supplies or services to enhance lessons.	NON-MEMBERS with no more than five years of teaching experience.	\$1,000 limit per region at \$200 per grant awarded. Up to five awards for seven regions
January 15 Even-numbered year only	<u>Excellence in Education (EiE) Awards</u> -S/P/N Level awarded at even-numbered S/P/N conventions -Regional Level awarded at each Regional Conference in even-numbered years (seven awards) -International Level awarded at the International Convention in odd-numbered years.	To recognize active educators for outstanding contributions in education. One application completed by nominee for consideration at three possible levels. Nominations deadline Nov 1 of odd-numbered year.	MEMBERS engaged in education with Nomination by the November 1 odd-numbered year deadline. Must be a recipient at the S/P/N level, to be eligible at the Regional level. Only Regional recipients are eligible for the International Award.	Varied S/P/N Level Awards \$500 Regional Award \$5,000 International Award to recipient for educational purposes, materials, coursework, or to enhance personal and professional educational goals
January 31	<u>Regional Professional Development (RPD) Scholarship</u>	For advanced study, post graduate degrees or National Board certification	MEMBERS engaged in education	\$3,000 per Region, to fund up to two annual scholarships
February 15	<u>Fine Arts Grants</u>	Encourage student enrichment in the fine arts.	MEMBERS engaged in education	\$10,000 single grant or divided among two or more recipients
February 15	<u>Agnes Robertson Global Outreach (ARGO)</u> (Formerly known as: Living Memorial Scholarship)	Opportunity for professional growth through the study of other cultures to promote World Understanding and develop educational resources.	MEMBERS engaged in education	\$2,500 annually for one recipient
April 15	<u>Regional Mini-Scholarships</u> (For activities taking place between May 15-Nov 15)	For non-Alpha Delta Kappa-sponsored conferences, classes or workshops.	MEMBERS engaged or retired from education	\$1,500 per region with up to \$500 per scholarship

Attend meetings outside of your chapter

Try to attend every Alpha Delta Kappa function that you can work into your schedule. You will learn so much during these times.

Encourage your chapter to sponsor your chapter officers, especially the president, to state meetings and the regional conference by paying for registration etc. If your chapter can afford it they should try to send you or a representative of the chapter to the international convention. She can report back on what she learned. Many chapters don't have the funds to send their president, but think out of the box. Maybe have a no bake-bake sale or auction.

Please sign up for the Regional virtual conference. The SCR will meet Friday, Aug 28 and the 7 regions will meet Sat, Aug 29.

Don't forget the Sunflower Summit will be in June 2021 in Hutchinson. Your chapter has been assigned a task to complete. If you don't know the task let me know. Cheryl will have more to follow.

Above all else, **use your resources. Don't' be afraid to ASK if you don't know.**

- Your immediate past chapter officers have a lot of knowledge.
- Anyone of your Kansas or regional officers or committee chairs are willing to make suggestions or answer questions. International staff is always there to help you also.
- Check out the international website and Kansas Website.
- Just an aside about the Kansas Website: Our own Rachel Phelps took on the responsibility to update it. She has spent hours doing this. If you haven't had a chance to look at it. DO! Encourage all members to check it out. It is awesome! I am so proud that we can share this wonderful website. There are links to help you access information. Here is the address and password for the website. www.KansasAlphaDeltaKappa.com PASSWORD: Kore1234

Also checkout the Kansas Alpha Delta Kappa Facebook page and like it. Ask chapter members to do the same. Check out Facebook pages for Kansas chapters and like them. If your chapter doesn't have a Facebook page please start one. It is a great way to connect with teachers not in your group.

The last thing is to invite Cheryl to a chapter meeting or event. She will be bringing state ways and means items to sell.

Thanks for checking in. Have a great biennium serving as your chapter president and president elect.

Truly inspiring leaders
GET RESULTS
by their own example:
They encourage others
to be responsible
and do the right thing...
They create space for others
to be inspired and to achieve