The purpose of this notebook is to serve as a guide for the

President-Elect

Although the role may seem obvious in some ways, documentation of the responsibilities will ensure consistency from year to year and promote a smooth flow of events during the meetings.

Please read the guidelines thoroughly and make note of any outdated statements for future edits.

DO NOT misplace this notebook.

Add your name to the bottom of the list on the “Previous Officers” page which follows on page 2.

In October, complete the end of year report found on the last page of this document.

Turn this notebook in to the President no later than the October guild meeting.

Thank you for your participation in the guild!

Previous Officers

For

President-Elect

|  |  |
| --- | --- |
| 2006-2007 | Dorothy Barr |
| 2007-2008 | Wendy Stone |
| 2008-2009 | Esther Weiner |
| 2009-2010 | Shelley Bertels |
| 2010-2011 | Edie Frasier |
| 2011-2012 | Dorothy Barr |
| 2012-2013 | Michelle Hackmeyer |
| 2013-2014 | Karen Skinner |
| 2015 | Pam Doffek |
| 2016 | Peggy Allen |
| 2017 | Kerry Cohen |
| 2018 | Carol Eskola |
| 2019 | Pam Doffek |
| 2020 | Lyn Geariety |
| 2021 | Sue Isaac |

**Guidelines**

The duties of the President-Elect include:

* Support and backup the President or other officers/chairpersons if needed.
* Watch, listen and learn in preparation for your year as President.
* Attend all Steering Committee meetings and guild meetings.
* Participate in working groups on guild Policies and Procedures as necessary.
* Organize the making of or purchase a gift for the outgoing President, which will be presented at the end of the December meeting, when the new officers are installed.
* Serve as chairperson of the Nominating Committee. For the Nominating Committee, you will need to select, or solicit as volunteers, two Steering Committee members and two regular guild members. You will be tasked with creating a slate of officers/chairpersons for your year as President. You will need to announce the officer nominations at the September meeting.
* Serve as a member of the Fiscal Planning Committee, which includes the President, President-Elect, Treasurer, and at least one other guild member. The President appoints this committee performs an analysis of the state of the guild’s operating and reserve funds, cash flow projections, and long-term soundness of the budget.
* Serve as a member of the Awards Committee, which includes a chairperson, the President-Elect, two Steering Committee members, a previous award recipient, and two members of the general guild membership.
* Maintain the QU Officer History file. The Excel file should be updated with the officers and chairpersons you line up for the next year.
* Serve as President the next year. A two year commitment, one as President-Elect and the next as President, is essential.
* You may find it helpful to follow the timeline presented below in completing your tasks (although any of these items can be started earlier).

**Timeline**

January:

1. This year’s budget will have been drafted and approved the previous fall. You may have been invited to attend the fall Steering Committee meeting(s) that dealt with the budget. If not, begin now to study the guild Budget, as this will help immensely in understanding issues with the guild’s operational capabilities and limitations.
2. Attend the January Steering Committee meeting, if held. Note that the President may call brief interim meetings at any time, either in lieu of or in addition to a “regular” Steering Committee meeting, although this is rare.
3. Read the electronic file of the notebook for the President, so you can be prepared to act as substitute if needed. If that notebook is not available on-line on the guild’s website (see next bullet item for its location), request a copy from the President if it has not already been provided to you.
4. Begin reading the notebook for each of the other officers and chairpersons to familiarize yourself with their roles. This will help you assist them in executing their duties. You also need to know this information when recruiting officers and chairpersons for your year as President.
Most of these documents are available on the guild’s website, unless they are currently being revised or contain information that should not be available on the web. (See website tab “Membership”, submenu item “Officers and Chairpersons”.)
5. Familiarize yourself with the guild’s website, both its organization and content. You should be able to direct members to information on the website when issues arise that are addressed in materials provided there.
6. Carefully read the guild’s Bylaws, as well as the document “Quilters Unlimited in Tallahassee Policies and Procedures: Implementing Section III of Guild Bylaws”. For the Bylaws, see website tab “Membership”, submenu item “Bylaws”. For the information about “Implementing Section III…”, see website tab “Membership”, submenu item “Policies and Procedures”.

February: Complete your review of the officer and chairperson notebooks.

March:

1. Organize the Nominating Committee. It should consist of you, two Steering Committee members and two regular guild members. The Nominating Committee is only required to nominate officers, but they may be willing to help you identify chairpersons as well.
2. Determine how you will go about soliciting officers/chairpersons for the next year. It is never too early to start talking to members about serving in various roles. The sooner you line up positions, the easier it will be. Also, some members may feel better about serving as a co-chairperson to lighten the responsibility or avoid having to stand in front of a microphone to make announcements.
**Note:** The Opportunity Quilt Chairperson that you will recruit will be responsible for the quilt to be auctioned two years after your year as President-Elect. For example, if you serve as President-Elect in 2018, the Opportunity Quilt Chairperson that you recruit will oversee creation of the quilt to be presented at the 2020 Museum Show.
3. If held in March, attend the Steering Committee meeting.
4. It’s not too early to begin planning what gift will be presented to the President at the end of the year. Previous gifts have included gift baskets, fabric collections, a quilt, quilting tools and other items that the President may enjoy. The budget generally includes a maximum of $100 for this gift. Solicit ideas from close friends of the President and even from the President. Donations from the membership may be gathered as part of the gift. Proper reimbursement forms and documentation will need to be submitted to the guild Treasurer to obtain reimbursement for this budget item. The Check Reimbursement form is located on the guild’s website on the “Membership” tab, menu item “Forms”. You may also obtain this form from the Treasurer.

April: Continue with the Nominating Committee’s solicitation of the following year's officers/chairpersons.

May:

1. Continue with the Nominating Committee’s solicitation of the following year's officers/chairpersons.
2. If held in May, attend the Steering Committee meeting.

June:

1. Continue with the Nominating Committee’s solicitation of the following year's officers/chairpersons.
2. Check with the Awards Committee Chairperson to see if there are nominations for the Distinguished Quilter Award (due June 1).

July: If held in July, attend the Steering Committee meeting.

August: Suggested deadline for having nominations for all of your officer positions and nearly all of your chairpersons.

September:

1. At this month’s guild meeting, introduce the Nominating Committee and announce/introduce the nominations for the elected officer positions: President, President-Elect, Membership Vice-President, Secretary, and Treasurer.
2. Work with the President to begin the meeting location reservation process for your year as President. This involves contacting the guild meeting location’s Facility Manager to confirm availability and to finalize reservations. During this process, provide your contact phone numbers and email address to the Facility Manager.

October:

1. At this month’s guild meeting, the officer nominations are reintroduced by the President and **officially elected** by the guild members.
2. Complete your year-end officer report this month and turn it in to the President.
3. Make certain that your President-Elect officer’s notebook is complete and up to date, and turn it in to the President for annual review.
4. Plan to meet with the President and next year’s President-Elect to review all officer/chairperson notebooks for edits and to read the year end reports and suggestions. It is important for the next President-Elect to review the notebooks for any changes or recommendations when he/she begins the recruitment process for the nominating committee.
5. This is a good time to update the QU Officer History file (an Excel file) identifying the officers and chairpersons you have lined up for the next year.
6. Check with the Awards Committee Chairperson to see if there are nominations for the Volunteer of the Year Award (due October 1).

November:

1. If the notebooks have not been completed previously, finalize work on these and distribute at the November guild meeting.
2. Finalize the purchase or creation of the President’s gift and prepare it for presentation at the December meeting.
3. Steering Committee meeting:
4. If held in November, attend the Steering Committee meeting.
5. Have a schedule ready to provide to the new officers/chairpersons with Steering Committee meeting dates and guild meeting dates. It is okay to list some as tentative. You will not meet as a Steering Committee again until January.
6. If possible, new officers and chairpersons receive their notebooks.

December:

1. Officer installment and presentation of the President’s gift will take place at the December guild meeting, including your installation as President.
2. Submit your first newsletter article (for the January edition) prior to the newsletter deadline.

**Newsletter submissions:**

All submissions to the newsletter must be written exactly as they will be printed. Do not ask the newsletter editor to mention something about a certain topic. Newsletter deadlines are posted in every newsletter (generally around the 25th of each month) and can be viewed at

www.quilttallahassee.com.

The e-mail address for the Newsletter editor is:

newsletter@quilttallahassee.com

You may be asked by the President to submit small articles for the Newsletter, such as the “Dates To Remember” column, which is a brief calendar for the upcoming two-three month dates of guild events.

**Website Submissions**

Website articles or dates are submitted to the website coordinator at

webcoord@quilttallahassee.com

Like newsletter articles, these are written exactly as they will be posted. Website postings can be made at any time, but expect a delay in the submittal of your item until its actual appearance on the website. You can request that urgent messages be sent via “e-mail blast”, but remember that these will only reach guild members who have e-mail.

**Advance Work**

You may wish to get a head start on some of your President responsibilities. The more you do this year, the less stressful your year as President will be. Observe the things that the President does and consider what you might do the following year. As President, you will need to write a short article each month for the newsletter and submit it to the Newsletter Chairperson. You could write some or all of these in advance, during your year as President-Elect, and avoid writer’s panic with deadlines. Past Presidents have done book reviews, history of blocks, etc. Some have discussed guild management issues, such as finances, finding sites for meetings, or recruiting officers and chairpersons. Other successful articles have focused on individual members, as a way to “meet” members that others may not know.

The President also provides a gift or tokens of appreciation to officers and chairpersons during their outgoing month. You could have these prepared in advance as well. Generally, they have been small handmade items such as needle books, bookmarks, etc.

**Guild Property**:

You will be provided with:

The QU President-Elect notebook.

**Budget:**

A budget may be allotted to the President-Elect position for the purchase of the President’s gift. The suggested maximum amount is $100.

**General Information about the Guild**

The guild is a Tax Exempt organization under the provisions of 501(c)(4) [operated exclusively for the promotion of social welfare and lobbying], not the more appropriate 501(c)(7) designation [social clubs]. The reason for our designation this way is no longer remembered by any of guild members. Our status as a Tax Exempt organization affects various aspects of the financial management of the guild. It is suggested that over your year as President-Elect, you discuss these aspects with the Treasurer and President.

The guild has a checking account and CDs at a local bank. A map of the bank’s branch locations is included in this notebook. Deposits can be made at any branch office. You can use the deposit slips available at the bank, adding the account number to them. Contact the guild’s Treasurer for our account number.

Best of luck to you in your new role!

Frequently Asked Questions

1. **Do I have to attend every guild meeting to be the President-Elect?**

Yes, you should plan on attending every meeting possible to support the President and be available to stand in if needed.

1. **Do I have to attend the Steering Committee meetings?**

Yes, you should plan on attending every Steering Committee meeting possible to support the guild and impact decisions that are made.

End of Year Report Office of President-Elect

**Complete this report in the month of October**

The information that you document will be helpful to future chairpersons to know what has been done, what was successful, etc. It will also help with possible decisions about revising the role and budgetary adjustments. Use additional paper if needed. File this report on top of the previous year end report.

Describe the year and anything unique that you did in this role:

What was most difficult for you in this role? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­­­­\_\_\_

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What was easiest for you in this role? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Budget allotted: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Did you exceed your budget? \_\_\_\_\_\_\_\_

Were there unusual expenditures?\_\_\_\_\_\_ Explain:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Recommend increase in budget? \_\_\_\_\_\_\_ How much? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What obstacles did you encounter?

Helpful Hints for future chairpersons:

Recommendations for change:

Your name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

PREVIOUS End of Year Reports Office of President-Elect

The information that you document will be helpful to future chairpersons to know what has been done, what was successful, etc. It will also help with possible decisions about revising the role and budgetary adjustments. Use additional paper if needed. File this report on top of the previous year end report.

Describe the year and anything unique that you did in this role:

I was nominated for 2022 President in September 2021 and so essentially became President Elect at that time.

What was most difficult for you in this role? \_\_\_\_\_\_\_I will be doing a lot of catching up!\_

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What was easiest for you in this role? \_\_\_Having good people to call on.\_\_\_\_\_\_\_\_\_\_\_\_

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Budget allotted: \_($100, maybe?)\_\_ Did you exceed your budget? \_\_No\_\_\_\_\_\_

Were there unusual expenditures?\_No\_\_\_ Explain:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Recommend increase in budget? \_\_No\_\_\_\_\_ How much? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What obstacles did you encounter?

Helpful Hints for future chairpersons:

Recommendations for change:

Your name \_\_\_Sue Isaac\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_10/4/2021\_\_\_\_\_\_\_\_\_