

INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) POLICIES PERTAINING TO LOCAL CHAPTERS

Instructions may be downloaded from the P.E.O. International member website:

Address: <https://members.peointernational.org>

Username: sisterhood

Password: seven (followed by the current year, e.g., seven2022)

KEY GUIDELINES	
<ul style="list-style-type: none"> • A local chapter shall use the Procedure for P.E.O. Chapter Meeting and Ceremony of Installation as they appear in the President’s Book. (Constitution, Part I, ARTICLE IV, Sec. 4) 	Statement of Policy During COVID-19
<ul style="list-style-type: none"> • The P.E.O. Sisterhood, or any division thereof, shall not affiliate with any other organization. (Constitution, Standing Rule #1) • Reciprocities, P.E.O. Groups, s/p/d chapters and local chapters shall not establish a P.E.O. fund within a college educational foundation or community foundation. 	Affiliations
<ul style="list-style-type: none"> • The Constitution, Bylaws and Standing Rules of International Chapter and the bylaws and standing rules of s/p/d and local chapters shall be followed as the rules and regulations of the Sisterhood. International, s/p/d and local chapters are not permitted to try procedures which are contrary to the Constitution or their respective bylaws and standing rules. • When an item has been adopted at Convention of International Chapter or s/p/d chapter which must be implemented by the local chapter, all local chapters must edit their bylaws and standing rules accordingly and send copy as instructed by the s/p/d executive board. • The year following Convention of International Chapter, the Constitution and all revisions relating to the local chapter shall be sent directly and billed to the chapters as directed by the Executive Board of International Chapter. The bill will appear on the Annual Report of Treasurer of Local Chapter. 	Constitution, Bylaws & Standing Rules

<ul style="list-style-type: none"> • If a local chapter wishes to propose an amendment to one of the International documents listed below, the chapter president should contact the Amendments and Recommendations chair of the s/p/d chapter for detailed instructions on the procedures to be followed. International documents that may be amended are: <ul style="list-style-type: none"> ○ Constitution: Introduction, Part I, Part II and Part III ○ Bylaws and Standing Rules of International Chapter ○ Procedure for P.E.O. Chapter Meeting (which includes the Opening Ode, Objects and Aims and Ceremony of Initiation) <p>Note: The portions of the Procedure for P.E.O. Chapter Meeting and Ceremony of Initiation that are in italics are instructions from the Executive Board of International Chapter and are not amendable.</p> <ul style="list-style-type: none"> • The Manual for the Amendments and Recommendations Committee is available on the P.E.O. International member website. 	<p>Proposed Amendments to the Constitution, Bylaws and Standing Rules, and Procedures for P.E.O. Chapter Meeting</p>
<ul style="list-style-type: none"> • For chapters in the U.S., Internal Revenue Service Identification Numbers will be assigned by the P.E.O. Executive Office in Des Moines, Iowa. Each chapter is to have only one ID number which is to be used on all bank accounts as well as on Form IRS-LC, Annual Summary of Treasurer of Local Chapter, filed with the P.E.O. Executive Office in March. <ul style="list-style-type: none"> ○ IRS Identification numbers are typically assigned within 2-3 weeks following a chapter organization meeting. ○ All questions concerning IRS identification numbers should be directed to the P.E.O. Executive Office; any correspondence received from the IRS should be forwarded to the P.E.O. Executive Office for handling. Do not contact the IRS. • IRS Classification <ul style="list-style-type: none"> ○ No local chapter shall be allowed to obtain an IRS 501(c)(3) charitable classification for local chapter funds. 	<p>IRS Identification Numbers & Classification (Chapters in US only)</p>
<ul style="list-style-type: none"> • If a charter of a local chapter is lost, a new charter may be purchased for \$18 from the P.E.O. Executive Office upon recommendation of the organizer of the s/p/d or International chapter. Requests should be emailed to the executive director. A replacement charter shall be reissued in the name of the original governing body, i.e., Supreme Grand, Supreme or International Chapter. 	<p>Lost Charter</p>
<ul style="list-style-type: none"> • The name of one city only shall be used to designate a chapter. • A proposal for change in location of a local chapter shall be presented at a meeting of the chapter and voted upon at the next meeting. A two-thirds ($\frac{2}{3}$) affirmative vote of members present shall be required. Action taken shall be reported to the president of the s/p/d chapter. Refer to IOLC Exhibit A – Procedure for Securing Change in Location of a Local Chapter of the P.E.O. Sisterhood. <ul style="list-style-type: none"> ○ Upon receipt of the chapter report, the president of the s/p/d chapter shall send the Petition of Local Chapter for Change in Location of Chapter Designation to be completed by the chapter and returned to the secretary of the s/p/d chapter. Refer to IOLC Exhibit B – Petition of Local Chapter for Change in Location of Chapter Designation. ○ The treasurer of the local chapter shall forward payment of the \$15 fee to the executive director. 	<p>Change in Chapter's City Designation</p>

<ul style="list-style-type: none"> • By decision of each local chapter, yearbooks may be distributed electronically with printed copies made available for members upon request and to s/p/d officers as required. • Username and password for the International Chapter website are not printed in yearbooks. 	Yearbooks
<ul style="list-style-type: none"> • Chapter meetings, as listed in the yearbooks, that are canceled for reasons of emergency (e.g., inclement weather, etc.) are not rescheduled. • Chapter meetings, as listed in the yearbooks, that are canceled because of lack of quorum are not rescheduled. 	Canceled Meetings

LEGAL ENTITIES	
<ul style="list-style-type: none"> • No local chapter or group of local chapters shall incorporate or form any partnership, trust or other legal entity without first securing the written approval of the executive board of the s/p/d chapter having jurisdiction over the chapter or group of chapters. Consent is also required from the Executive Board of International Chapter. 	Incorporation or Formation of Other Legal Entities
<ul style="list-style-type: none"> • Should a local chapter be the recipient of real property, title to such property may be held by the P.E.O. Foundation and, under direction of the Foundation trustees, the local chapter may act as administrative agent. 	Real Property

MISCELLANEOUS	
<ul style="list-style-type: none"> • Observance of Founders' Day shall be done in accordance with s/p/d bylaws and standing rules. 	Founders' Day
<ul style="list-style-type: none"> • The storage of local chapter minutes and/or historical memorabilia may not be housed in a facility (e.g., library, museum, college archives, historical society, etc.) which would allow access to the materials by the public (anyone other than P.E.O. members). • Minutes older than 10 years may be archived on digital media. If this method of preservation is chosen, the chapter is responsible to maintain the archived minutes on current technology. • For more information, see P.E.O. Historical Collections Guidelines for Local Chapters. 	Archival Storage for Minutes and/or Historic Memorabilia
<ul style="list-style-type: none"> • S/P/D and local chapters wishing to collect and remit funds in response to a natural disaster or other catastrophe may do so only at the s/p/d or local chapter level. In order to protect its educational and charitable status, the P.E.O. Foundation will accept no funds for disaster relief purposes. • All disaster relief funds are to be temporary and are not to take precedence over support for the P.E.O. philanthropic projects. Any communications regarding s/p/d and local disaster relief efforts should be approved by the executive board of the s/p/d chapter. 	Disaster Relief Funds

<ul style="list-style-type: none"> • The supplies of a local or s/p/d chapter lost or damaged due to a disaster shall be replaced free of charge by International Chapter upon request of the president of the s/p/d chapter. • When a member’s emblem is lost due to a natural disaster such as a flood, tornado or hurricane, the emblem shall be replaced by International Chapter at no charge. This includes a past president of International Chapter’s recognition emblem and a past s/p/d president’s recognition emblem. 	<p>Losses Due to Natural Disaster</p>
<ul style="list-style-type: none"> • If an event is held in an establishment that is in the business of selling liquor, it is the responsibility of the establishment to maintain liquor liability insurance and a valid liquor license. It is also their decision to determine who to serve and, more importantly, who not to serve. • If an event is held in a member’s home, liability will be the responsibility of the homeowner. The homeowner’s insurance coverage should be verified prior to the event and will be considered primary in the event of a claim. • If a chapter, reciprocity or other group of chapters sponsors an event in a public venue involving the consumption and/or sale of alcohol, it will be their responsibility to obtain any event insurance required by the venue and investigate the applicable local and state/provincial/district laws pertaining to a liquor license requirement. • Under no circumstances may a P.E.O. chapter, reciprocity (or other group of chapters) or a member acting on behalf of P.E.O. obtain a liquor license. 	<p>Alcohol Policy</p>
<ul style="list-style-type: none"> • P.E.O. does not carry automobile insurance to cover vehicles rented by any members other than the Executive Board of International Chapter. • For all other members of the P.E.O. Sisterhood (including members of boards and committees, s/p/d officers and local chapter members), their personal auto insurance shall be the only auto insurance coverage for damages to the rental vehicle as well as any liability for bodily injury or property damage to others. Liability insurance would cover P.E.O. as an organization, but not individual members in the event a third party filed a claim against P.E.O. for damages or injuries incurred while a member was driving a rented vehicle. • It is strongly advised that members traveling for P.E.O.-related business NOT rent a vehicle unless purely for personal use. 	<p>Car / Vehicle Rental</p>
<ul style="list-style-type: none"> • News release templates are available on the P.E.O. International member website for local chapters for the following purposes: • Refer to the Publicity Policy to: <ul style="list-style-type: none"> ○ Promote upcoming public events and fundraisers. Local chapters should consult the Media Guide available on the P.E.O. International member website for assistance in style; and ○ Promote recipients for International, s/p/d and local chapter projects. Unless a signed copy of the P.E.O. Photograph and Publicity Consent Form is received from recipient, no personal, identifying information can be shared on news media, P.E.O. websites or social media accounts. 	<p>Publicity Policy</p>

<ul style="list-style-type: none"> • The P.E.O. insignia registered in the U.S. Patent Office (#766095) may only be used on items for official business of local, s/p/d and International chapters (including P.E.O. Groups) or on articles sold by the P.E.O. Supply Department. • Approval is given for the use of the P.E.O. emblem on a headstone or a P.E.O. grave marker at the place of burial of a member if the family of the deceased so desires. The P.E.O. emblem may also be used as an identifying logo on an official P.E.O. website or a convention program/proceedings. • The P.E.O. emblem shall only be used as a standalone insignia. It may not be incorporated or used as an enhancement in other graphic designs. • Other star designs and informal stylized logo may be used at the chapter’s discretion. <ul style="list-style-type: none"> ○ Exception: Informal, stylized designs shall not be used on a headstone or grave marker. For uses of a more serious nature, the registered “star” logo should continue to be used. 	<p>Use of P.E.O. Insignia</p>
<ul style="list-style-type: none"> • No photos or videos of the Initiatory Emblem may be taken for any reason. Photos of the initiate(s) and members are allowed after the meeting is adjourned. The Initiatory Emblem is not to be used during the COVID-19 pandemic emergency. 	<p>Initiatory Emblem</p>
<ul style="list-style-type: none"> • Quotations from the Procedure for P.E.O. Chapter Meeting (except the Opening Ode and Objects and Aims), Ceremony of Initiation, and Ceremony of Installation shall not appear in yearbooks, The P.E.O. Record, or papers which may come before the public. (Constitution, Part III, ARTICLE XI, Sec. 5) 	<p>P.E.O. Quotations</p>
<ul style="list-style-type: none"> • P.E.O. informational materials prepared by local chapters shall not be advertised for sale in The P.E.O. Record. They shall not be circularized, sold or distributed in any way without permission of the executive board of the s/p/d and/or International Chapter. 	<p>P.E.O. Informational Materials</p>

1. The primary purpose of a P.E.O. website for a state/provincial/district (s/p/d) or local chapter or a P.E.O. Group is to provide information only.
2. Please refer to the P.E.O. International member website Brand Resource Center for resources.
3. Adhere to Constitution Standing Rule #2. Also refer to Policies section of IOLC [Circularization](#) for information.
4. Information must be of local or s/p/d chapter interest.
5. Local chapters' websites may be used to sell items as part of fundraising. Refer to Policies section of IOLC [Direct Sale of Goods](#) for requirements.
6. Any P.E.O. website must be secured by a password. The use of P.E.O. membership lists and/or addresses is prohibited unless in the password protected area of the website to limit exposure to any mass mailing and solicitations. If a chapter chat room is included, topics must be limited to items of general information such as programs, fundraising, social activities, etc.
7. Consult the P.E.O. International member website for current project information.
8. Applicants for P.E.O. projects shall not be solicited on a website. The only exception is student application forms available on the Cottey College website.
9. Keep the information on the website current.
10. When creating a website do NOT use the official P.E.O. insignia (the star, letters P.E.O. and Greek key design). The new informal logo with the yellow and pink daisy, a rendering of the emblem, stylized stars or marguerites may be used. Be cognizant that the appearance of your "Facebook wall" or social media front page portrays an image of P.E.O. to everyone – members and nonmembers.
11. CAUTION – It is important to contact and provide information for all members not on email or members without access to a website.
12. Local Chapters/P.E.O. Groups: You MUST register your site and any passwords with your s/p/d president.

Note: Chapter minutes may not be posted on websites.

S/P/D Chapters: You MUST register your site and any passwords with the executive office. Send all applicable information to mediamanager@peodsm.org.

Website Guidelines

SOCIAL MEDIA

- Local and s/p/d chapters can use social media to stay connected with each other online and/or to share with others about their chapter. Accounts for local or s/p/d chapters are to be owned and managed by the chapter and are not monitored by International Chapter. Participation or interaction with any local or s/p/d chapter social media presence is at the discretion of each individual person.

- Chapters using social media should consider the following:

A page or a group can be created on Facebook for a chapter. A page is public-facing and can be viewed by members and nonmembers alike. It is a good option if the intention is to bring awareness to the chapter and to P.E.O. If a page is chosen, be cognizant of what is posted as it can be viewed by anyone. A group can be closed, requiring the group administrator to approve members. A group is best if the chapter wants to have a discussion forum or posting board for members.

Platforms such as Instagram, Pinterest and Twitter are generally visible to anyone; however, they can be set to private if desired. It is up to the administrator of these accounts to manage these settings and for the chapter to determine the intent and preference for these accounts.

- Groups created for local, state, provincial and district chapters as well as groups created for the purpose of connecting P.E.O.s are required to adhere to the following:

1. Naming structure

- a. For local chapter groups – P.E.O. Chapter A, Daisytown, Iowa
- b. For s/p/d groups – P.E.O. Iowa State Chapter
- c. For outside/non-chapter groups – P.E.O. (insert name of group)

2. Groups and conversations must uphold the P.E.O. brand, essence, voice and the Objects and Aims (see P.E.O. Brand Tool Kit).
3. Groups, except for a local chapter group, must notify International Chapter of the group by emailing mediamanager@peodsm.org with the name of the group and administrator(s).
4. Group administrators are responsible for monitoring discussion and removing content that does not uphold the P.E.O. values. Groups that do not may be required to close or remove P.E.O. from their name as directed by International Chapter.
5. If the group is set up as a “Closed Group,” administrators must verify P.E.O. membership prior to granting access.
6. Any group with P.E.O. in its name must post and adhere to Rules and Etiquette. The Rules and Etiquette below must be posted as part of the group description, included in the “about” section and potential members must agree to follow the group’s Rules and Etiquette before being allowed to join.

Rules and Etiquette

P.E.O. International encourages members to come prepared to share successes, challenges, provide constructive feedback, bring questions and provide perspective in all manners related to chapter life. Members must agree to follow the Rules and Etiquette to ensure the group remains an open space to discuss issues and topics

related to P.E.O. chapters.

Promotional messages are not permitted in P.E.O. groups.

- Uphold the P.E.O. brand and our Objects and Aims.
- Don't attack others. The discussions on social media are meant to stimulate conversation not to create contention. Let others have their say, just as you may.
- Don't post commercial messages.
- Group posts should not contain promotional material, special offers, job offers, product announcements or solicitation for services.
- Fundraising posts – refer to Policies section of IOLC [P.E.O. Fundraising](#).
- All defamatory, abusive, profane, threatening, offensive language or illegal materials are strictly prohibited and will be removed.
- Members who interact with P.E.O. on social media in any capacity should be reminded that they must abide by Constitution Standing Rule #2 – Circularization. Also refer to Policies section of IOLC [Circularization](#) for information.
- Refer to Policies section of IOLC [Promotion of Fundraisers on Social Media](#) for information on how to use social media for chapter fundraisers.
- The official P.E.O. insignia is only to be used by International Chapter; however, P.E.O. International posts that use the official insignia can be shared to a chapter page, group or other social media profile. Other logos and graphics may be used.
- International Chapter has official social media profiles on Facebook, Instagram, LinkedIn and Twitter. Use these profiles to find the most accurate information and to share content to your local or s/p/d chapter profiles.

Facebook: PEO International

Instagram: @peointernational

LinkedIn: International Chapter of the P.E.O. Sisterhood

Twitter: @PEOSisterhood

CIRCULARIZATION

<ul style="list-style-type: none"> • Standing Rule #2 in the Constitution, Bylaws and Standing Rules of the P.E.O. Sisterhood requires s/p/d and/or International executive board authorization for circularization among members, local chapters, reciprocity groups, P.E.O. Groups or hostess groups. • Circularization is defined as the circulation of letters, leaflets or canvassing by any other means (including social media, electronic or verbal communication) to other chapters and/or individual members of other chapters. • Examples of social correspondence that are not circularization requiring authorization: <ul style="list-style-type: none"> ○ Fundraising correspondence among chapters within a state, province or district. The fundraiser shall be in compliance with the Fundraising Policy. Refer to Policies section of IOLC P.E.O. Fundraising. ○ A luncheon or other social event among chapters within a state, province or district. ○ Social invitations, anniversary celebrations or greetings to local and/or s/p/d chapters in other states, provinces or districts. 	<p>Definition / Examples</p>
<ul style="list-style-type: none"> • In the absence of specific P.E.O. guidance, Robert’s Rules is the formally adopted parliamentary authority. As it pertains to proposed amendments to P.E.O. documents, guidance from Robert’s Rules tells us that it is essential that every side has an equal opportunity to explain the pros/cons during debate. Therefore, discussion about the merits of or concerns with amendments shall be avoided until all sides can be heard during debate at convention. • Absentee or proxy ballots are not allowed for local chapter business. 	<p>Parliamentary Authority</p>
<ul style="list-style-type: none"> • Authorization is required when the circularization within the state, province or district pertains to a project of the Sisterhood at large. <ul style="list-style-type: none"> ○ If the circularization has been approved by a s/p/d convention, the consent of the s/p/d executive board is not required. • An example of circularization that requires the authorization of the executive board of a s/p/d is: <ul style="list-style-type: none"> ○ Contacting other chapters and/or individual members of other chapters with opinions on P.E.O. matters through social media, letters, petitions, leaflets and electronic or verbal communication. • Any circularized communication should include a statement that authorization has been granted by the s/p/d executive board (and the Executive Board of International Chapter when required). 	<p>Authorization Required by S/P/D Executive Board</p>

<ul style="list-style-type: none"> • Authorization is required by the Executive Board of International Chapter when the circularization would extend beyond the s/p/d chapter. This is not applicable to social correspondence. • Any circularized communication should include a statement that authorization has been granted by the Executive Board of International Chapter. 	<p>Authorization Required by International Executive Board</p>
<ul style="list-style-type: none"> • Members, local chapters or s/p/d chapters shall not circularize other members, local chapters or s/p/d chapters for the sale of an item connected with the Ceremony of Initiation. • Members, local chapters or s/p/d chapters shall not circularize other members or local chapters beyond the boundaries of their state, province or district concerning the sale of goods and services whether the profit be for personal gain or the benefit of P.E.O. projects. Refer to Standing Rule #2 of the P.E.O. Sisterhood regarding circularization within a state, province or district. • P.E.O. members shall not use P.E.O. membership information for <i>private inurement</i>, which is an IRS concept that prohibits the use of nonprofit information or resources for personal financial gain or other business purposes. 	<p>Sales of Goods and Services</p>
<ul style="list-style-type: none"> • Members provide us with their email addresses with the understanding they will not receive “unsolicited” or mass emails from P.E.O. members. Chapter presidents and state officers have allowed us to publish their email addresses for your convenience. Please respect their trust in us. • Circularization is defined as the circulation of letters or canvassing by any other means (including social media, electronic or verbal communications) to other chapters and/or individual members of other chapters. This rule is in place strictly for the protection of our members’ contact information and to limit solicitation. Our membership publications and listings (e.g., Directory of Presidents, Bed and Breakfast, Rx: TLC, Reciprocity Reference) and local chapter yearbooks are not to be used to compile mailing lists or send emails for one’s personal and/or business use. • Email addresses are only intended for official P.E.O. business and/or approved communications. Each P.E.O. should be aware of Standing Rule #2 in the Constitution, which requires s/p/d and/or International executive board authorization for circularization among members, local chapters, reciprocity groups or P.E.O. Groups. 	<p>Privacy Policy</p>

<p>MEMBERSHIP</p>	
<ul style="list-style-type: none"> • P.E.O. membership lists are to be used exclusively by P.E.O.s and are not to be used, even by P.E.O.s, for circulation, solicitation or commercial purposes of any kind. 	<p>Membership Lists</p>
<ul style="list-style-type: none"> • The lateral transfer provides a solution for the member who – for a variety of reasons – is now unable to attend meetings of her chapter. A lateral transfer makes it possible for a P.E.O. to join another chapter in the same city or area with a more convenient meeting time or location. • Chapters should encourage the lateral transfer process when applicable. Use the Lateral Transfer Introduction form that is available on the P.E.O. International member website under Resource Library, Local Chapter Officers – President. 	<p>Lateral Transfer Introduction</p>

<ul style="list-style-type: none"> • The Introduction of a Woman Who Is Not a P.E.O. form, available on the P.E.O. International member website under Local Chapter Forms – President, may be used by a P.E.O. to introduce a woman who is NOT a P.E.O. member to a chapter(s) in another community. • This form is an introduction. Although the chapter receiving this form is under no obligation to issue an invitation, please consider meeting this woman. 	<p>Introduction of a Woman Who Is Not a P.E.O.</p>
<ul style="list-style-type: none"> • Due to the COVID-19 pandemic emergency, Reaffirmation of Vows, during an In-person Chapter Meeting or Hybrid Chapter Meeting, will not be conducted until further notice. Reaffirmation of Vows may be conducted during a Virtual Chapter Meeting. 	<p>Reaffirmation of Vows</p>
<ul style="list-style-type: none"> • A member who has not paid s/p/d and International dues before March 1 is inactive. Refer to President’s section of IOLC Emblem Disposition for Inactive Member for guidelines on return of an inactive member’s emblem. • Members inactive for 25 years who have not been heard from within a reasonable number of years and/or whose whereabouts are unknown, shall be reported LC (lost contact) on the Annual Report of Corresponding Secretary. Refer to Corresponding Secretary’s section of IOLC Annual Reports for instructions. 	<p>Inactive Member</p>

<p>P.E.O. RECIPROCITIES & GROUPS</p>

<ul style="list-style-type: none"> • When reciprocities have regular dues or per capita assessments, the dues shall be in the article on finance in the bylaws and standing rules of the local chapter. If the assessment is of a temporary nature, it need not be in the bylaws and standing rules but may be paid upon vote of the chapter. 	<p>Dues</p>
<ul style="list-style-type: none"> • All funds of P.E.O. Reciprocities and P.E.O. Groups shall be kept in checking accounts, savings accounts or other interest-bearing accounts. • The Internal Revenue Service requires that identification numbers be on file for P.E.O. Reciprocities and Groups maintaining bank accounts. <ul style="list-style-type: none"> ○ Identification numbers must be obtained by the P.E.O. Executive Office. 	<p>Checking / Savings Accounts</p>
<ul style="list-style-type: none"> • Because P.E.O. Reciprocities and Groups are included under International Chapter's group exemption with the IRS, all fundraising events should comply with the current P.E.O. Fundraising Policy. • Effective May 1, 2016, permanent funds may only be established through the P.E.O. Foundation in support of P.E.O. International projects. 	<p>Tax Exemption</p>

<p>BED & BREAKFAST</p>

<ul style="list-style-type: none"> • Due to the COVID-19 pandemic emergency, P.E.O. Bed and Breakfast is suspended until further notice. 	<p>General Guidelines</p>
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PYRAMID OF GIVING



- In order to further the shared mission of the P.E.O. Sisterhood and to maintain compliance with the U.S. Internal Revenue Service, chapters should consider the P.E.O. Pyramid of Giving. This policy provides a three-tiered pyramid representing the three levels of contributions—International projects, state/provincial/district projects and local chapter interests.
- A chapter should consider giving on three priority levels. The base of the pyramid represents the largest portion of a chapter’s giving and this should be support to the International Chapter projects. The middle section of the pyramid represents contributions to state/provincial/district chapter projects. The smallest portion of the pyramid is the tip—the portion of chapter giving that is available for community support—such as honorariums for chapter speakers, minimal gifts to project recipients and local scholarships (whether paid directly from chapter funds or chapter donations made to those held in the P.E.O. Foundation).*
- Though the exact amounts or percentages of giving may be different among chapters, the shape of the pyramid should guide chapter decisions and help to focus support on the projects that represent the shared mission of our Sisterhood.

**Please note that local chapter scholarships are permissible but not encouraged by International Chapter. Financial support of local chapter scholarships and community giving shall not exceed support to state/provincial/district projects, which shall not exceed International project support.*

See also: [P.E.O. Finances & Service Policy](#) in *P.E.O. Fundraising—Policies*, page 13.

P.E.O. FUNDRAISING

(Including sales of goods and services, raffles, auctions, etc.)

The purpose of this policy is to allow members to support P.E.O. through various fundraising activities that reflect devotion to our principles, protection of members from legal liability and adherence to all applicable laws and regulations. Due to the COVID-19 pandemic emergency, all chapter fundraising activities must follow local health guidelines and Overarching Guidance for P.E.O. Gatherings.

General Fundraising Policies

<ul style="list-style-type: none"> In keeping with the mission of P.E.O., the focus of chapter funds and fundraising activities shall be International Chapter projects, followed by state/provincial/district projects. To protect International Chapter’s tax exemption with the U.S. Internal Revenue Service, chapters must demonstrate the mission of P.E.O. through financial support. Therefore, P.E.O. dollars, offered and earned by members in the name of P.E.O., should be considered primarily for approved P.E.O. projects and/or the P.E.O. Foundation with minimal chapter funds used for outside philanthropic or local educational activities. To strengthen P.E.O.’s visible influence in the community, chapters and chapter members are encouraged to offer their talents and skills, time and service for local philanthropic and educational endeavors. 	P.E.O. Finances & Service Policy
<ul style="list-style-type: none"> In any fundraising event sponsored by a chapter or by a member, it is imperative that the following statement be provided on all event advertisements or communications and distributed to all donors: <i>“P.E.O. chapters support the educational and charitable funds of the P.E.O. Sisterhood but are not classified as charitable by the IRS. Therefore, donations to individual chapters do not meet the IRS requirements for a charitable income tax deduction. P.E.O. shall not be liable in any way for any goods and services supplied by third-party vendors or public establishments.”</i> <p>Further, individual members must be made aware that they are potentially liable for any accident occurring on property owned by them or in any automobile or other motorized vehicle used or provided by them for any activity associated with P.E.O.</p>	Required Notice
<ul style="list-style-type: none"> P.E.O. chapters are classified as nonprofit entities but are not considered charitable by the IRS under Section 501(c)(3). All donations to and payments for a chapter fundraiser must be issued directly to the chapter and are not eligible for a charitable contribution deduction. Payments are not to be made payable to any P.E.O. project or the P.E.O. Foundation in connection with a fundraiser involving exchange of goods or services. 	Payments for Chapter Fundraisers
<ul style="list-style-type: none"> No member’s personal vehicle may be used for hire as a fundraising activity. P.E.O., as an organization, does not have automobile insurance that applies to any damage to the vehicle or liability to third parties, including passengers in the vehicle that arises from travel associated with P.E.O. functions of any type. 	Use of Personal Vehicle
<ul style="list-style-type: none"> The cover of The P.E.O. Record may not be copied or used for commercial or fundraising purposes, except by the original artist. 	Cover of P.E.O. Record
<ul style="list-style-type: none"> Chapters may advertise items for sale in the Fundraising Marketplace section of The P.E.O. Record and the P.E.O. International member website. Thumbnail pictures of the sale item(s) may be included on the website posting in accordance with the established fee structure. 	P.E.O. Record Advertisements

<ul style="list-style-type: none"> All chapter fundraisers must be conducted and promoted using only volunteer labor. No form of compensation can be offered to any individual, organization or vendor (including professional fundraisers) to conduct, promote or sell items for a P.E.O. fundraiser. <p>(Exception: Casino/Bingo Events must use a professional party company. Refer to Policies section of IOLC Casino/Bingo Events.)</p>	<p>Volunteer Labor</p>
<ul style="list-style-type: none"> Joint fundraisers are only allowed with other chapters or reciprocities. No joint fundraisers with non-P.E.O. entities are permitted. Income and expenses shall be allocated as follows: <ul style="list-style-type: none"> Expenses can be paid directly by each chapter and income received and deposited by each chapter. (Each chapter would pay vendors for their share of expenses and receive income directly for the items they sell.) OR One chapter maintains records and handles all income and expenses for the event. At the conclusion of the event, expenses and revenue are allocated in the same, though not necessarily equal, proportion. (If one chapter is responsible for 60% of expenses, they receive 60% of the revenue.) The exact allocation is determined by the chapters participating in the joint fundraiser. 	<p>Joint Chapter Fundraisers</p>
<p>Promotion of fundraisers on social media shall adhere to the following guidelines:</p> <p>The details of a chapter fundraiser may be posted on social media accounts of a member, chapter, reciprocity or P.E.O. Group. These postings shall include only:</p> <ol style="list-style-type: none"> The item(s) for sale or the name of the fundraising event Applicable date(s) Price Location P.E.O. chapter contact information A picture or graphic <p>All fundraising posts on social media other than on a member, chapter, reciprocity or P.E.O. Group account are limited to:</p> <ol style="list-style-type: none"> The item(s) for sale or the name of the fundraising event A picture or graphic Requests for information must be handled through private messaging. <ul style="list-style-type: none"> A sample post is “P.E.O. Chapter ABC makes a wonderful dry pancake mix! If you are interested in knowing more about it, please send me a personal message and I can share more details.” Postings shall not include links to commercial websites or any non-P.E.O. contact information. No endorsements or advertisements are allowed. Only the basic facts listed above may be posted. 	<p>Promotion of Fundraisers on Social Media</p>
<p>Before any sale of goods, determine possible sales tax liability. Contact the state department of revenue and inquire as to sales tax liability for an <i>upcoming</i> fundraiser held by a 501(c)(4) organization. Describe your proposed fundraiser only. Do not offer any information concerning past fundraisers or other chapters.</p>	<p>Sales Tax</p>

<p>Net income from P.E.O. fundraising activities (excluding P.E.O. Bed & Breakfast) must be used for the following:</p> <ul style="list-style-type: none"> • P.E.O. projects • Other qualified educational and/or charitable purposes • Chapter operating expenses/retained in chapter funds • Other activities as approved by the chapter 	<p>Fundraising Net Income</p>
<p>When sales of goods or services occur, details shall be reported annually on Form IRS-LC, Annual Summary of Treasurer of Local Chapter, including an itemized account of how the profit was allocated.</p>	<p>Reporting of Fundraising Activity on IRS-LC</p>
<p>The U.S. Internal Revenue Service discourages private inurement within nonprofit organizations. Private inurement is defined as individuals receiving financial benefit from their association with a nonprofit organization. In order to prevent the appearance of private inurement, P.E.O. members should avoid personal profit from any fundraising activity.</p>	<p>Private Inurement</p>
<p>Notifying other chapters of items for sale:</p> <ul style="list-style-type: none"> • The rules of circularization apply as described in Standing Rule #2 of the Constitution, Bylaws and Standing Rules of the P.E.O. Sisterhood. • Refer to Policies section of the IOLC – Circularization for definition and examples. 	<p>Circularization</p>
<p>Fundraising Activities</p>	
<p>Sales of purchased or donated items by local or s/p/d chapters, reciprocities or P.E.O. Groups</p> <p>When chapters, reciprocities or P.E.O. Groups purchase or receive items up front for the purpose of reselling at a profit, the following requirements shall apply:</p> <p>** Before beginning any fundraising activity, review the General Fundraising Policies **</p> <ul style="list-style-type: none"> • Sales must be to individuals only and NOT FOR RESALE. • There is no limit on the value of items. • All work in carrying on such sales must be done by the members or others for the organization WITHOUT COMPENSATION. (For example, fundraising items cannot be sold in a commercial setting where the business receives a portion of the sales.) • Chapters may sell items using a local or s/p/d chapter website (with permission of the executive board of s/p/d chapter). • Two separate entities each exempt from paying income tax may not each make a profit on the sale of the same item. 	<p>Direct Sale of Goods (with advance purchase of goods)</p>

<p>Sale of items through a third-party vendor</p> <p>Local or s/p/d chapters, reciprocities and P.E.O. Groups may sell items through a vendor website, pre-sale arrangement or shared commission arrangement according to the following guidelines:</p> <p>**Before beginning any fundraising activity, review the General Fundraising Policies**</p> <ul style="list-style-type: none"> • Sales must be to individuals only and NOT FOR RESALE. • There is no limit on the value of items. • The cost of items shall not vary based on the quantity sold. • The maximum duration of each fundraiser is 30 consecutive days and may not be repeated during the local chapter year (March through February). • The vendor shall not promote the event on behalf of the chapter or provide website access to P.E.O. fundraising items other than through secure access. (For example, a private code may be provided to access the section of a website where P.E.O. fundraising items are available.) • Delivery of items to the final buyer can be handled by the vendor OR sent to the chapter for final delivery. • Chapters shall not link to any non-P.E.O. website on social media. • Chapters do not have to limit sales to P.E.O. related items, such as star towels, marguerite notepads, etc., or market only to P.E.O. members. • Two separate entities each exempt from paying income tax may not each make a profit on the sale of the same item. <p>When hosting home sales parties (jewelry, kitchen supplies, etc.), the party consultant should not be a P.E.O. member to avoid the appearance of private inurement. (See Private Inurement above.)</p>	<p>Indirect Sale of Goods (without advance purchase of goods)</p>
<p>Local or s/p/d chapters, reciprocities and P.E.O. Groups may sell services.</p> <p>**Before beginning any fundraising activity, review the General Fundraising Policies**</p> <ul style="list-style-type: none"> • Sales must be to individuals only and NOT FOR RESALE. • No limit on value of services. • All work in carrying on such sales must be done by the members or others for the organization WITHOUT COMPENSATION. • No member's personal vehicle may be used for hire as a fundraising activity. (Refer to Use of a Personal Vehicle). • No sales of services are allowed via websites. 	<p>Sales of Services</p>

****Before beginning any fundraising activity, review the [General Fundraising Policies](#)****

- Permits
 - Local Chapters (Provide documentation to s/p/d chapter)
 - The chapter bears responsibility to research and follow all applicable gambling and tax laws and provide proof of such to the s/p/d chapter **prior** to the announcement of the event.
 - S/P/D Chapters (Maintain documentation in s/p/d chapter records)
 - S/P/D chapters holding these events must comply with all applicable gambling and tax laws and be able to provide proof of such to the auditor or Auditing Committee.
- Prizes
 - Services **MUST** be individually valued at \$500 or less.
 - Performed by a commercial business:
 - A gift certificate or other documentation spelling out the exact nature of the services should be provided to the recipient.
 - The business donating services must be informed that the chapter is NOT a 501(c)(3) charitable organization, meaning no charitable contribution tax deduction is available to the donor. Refer to Policies section of IOLC [Required Notice.](#))
 - Performed by a member for another individual:
 - Examples include meal preparation, lawn care, pet-sitting, etc.
 - **EXCEPTION:** No fundraising event shall include an offering of chauffer or delivery services, unless done by a professional commercial business.
 - Goods **MUST** be individually valued at \$500 or less.
 - The individual or commercial business donating goods must be informed that the chapter is NOT a 501 (c)(3), charitable organization, but merely nonprofit, meaning no charitable tax deduction is available to the donor. Refer to Policies section of IOLC
 - Individuals may offer time shares, vacation homes and other property for use in chapter fundraising. The property owner accepts all liability. P.E.O. bears no responsibility for property damage or bodily injury to users. Owner's insurance policy provides primary coverage.
- Online raffles are not permitted.

**Raffles and Other
Fundraisers
Involving an
Element of Chance**

<p>**Before beginning any fundraising activity, review the General Fundraising Policies**</p> <ul style="list-style-type: none"> • Sales must be to individuals only and NOT FOR RESALE. • No limit on value of services. • All work in carrying on such sales must be done by the members or others for the organization WITHOUT COMPENSATION. • Individuals may offer time shares, vacation homes and other property for use in chapter fundraising. The property owner accepts all liability. P.E.O. bears no responsibility for property damage or bodily injury to users. Owner’s insurance policy provides primary coverage. 	<p>Auctions (Live and Silent)</p>
<p>**Before beginning any fundraising activity, review the General Fundraising Policies**</p> <ul style="list-style-type: none"> • All events such as casino nights, bingo events, poker games, etc. must be conducted using a properly licensed professional party company. The professional party company is not to promote the event on behalf of the chapter. • Only non-cash prizes can be offered at individual values under \$500. <p>The chapter bears responsibility to research and follow all applicable gambling and tax law and provide proof of such to the s/p/d chapter <i>prior</i> to the announcement of the event.</p>	<p>Casino/Bingo Events</p>
<p>**Before beginning any fundraising activity, review the General Fundraising Policies**</p> <ul style="list-style-type: none"> • Participation Requirements Determined by Sponsoring Company <ul style="list-style-type: none"> ○ May be asked to provide proof of IRS status – Section 501(c)(3), meaning charitable, or Section 501(c)(4), meaning nonprofit (but not charitable). Local and s/p/d chapters are all 501(c)(4). If the sponsoring company requires proof of charitable or 501(c)(3) status, P.E.O. chapters cannot participate. ○ Other requirements for participation may determine the chapter’s ability to enroll. • Requires Approval from the P.E.O. Executive Office <p>Due to complexity and variety of these programs, please contact the P.E.O. Executive Office to request approval for participation.</p>	<p>Scrip Programs</p>

S/P/D CONVENTION INFORMATION

Sections below applying to in-person (“IP”) or virtual (“V”) conventions are indicated with an “IP” or “V,” respectively.

- Sales by hostess chapters and/or the s/p/d chapter shall be limited to items sold to help defray convention costs. Sales other than those limited to help defray the cost of convention could jeopardize the tax-exempt status of the P.E.O. Sisterhood. Laws relating to retail sales vary greatly in states, provinces, districts and communities and are to be observed. (IP, V)
- Within the limitations mentioned above, silent auctions may be held during in-person conventions, offering no more than three items, each with a value not to exceed \$500. Bids must be posted at the convention site and the winner announced prior to the close of convention. (IP)
- In addition to items sold to defray the cost of convention, a s/p/d chapter may sell P.E.O. related items such as s/p/d history, s/p/d chapter directory or commemorative item(s) for a significant anniversary of the s/p/d chapter. (IP, V)
- With the approval of the s/p/d executive board, local chapters may advertise their fundraising items with descriptive sheets available in the following manner:
 - Placed in convention kits (IP, V)
 - Included with the convention mailing (IP, V)
 - Sent with the s/p/d newsletter (IP, V)
 - Placed on the s/p/d website (IP, V)

Sale of Items at Convention

Note: Samples of fundraising items may be displayed with order forms available; however, no sales are permitted at convention. (IP, V) Preordered and prepaid items may be delivered at convention. (IP)

- The hostess s/p/d chapter(s) for Convention of International Chapter may sell International Convention commemorative items at s/p/d convention the year of and the year after that Convention of International Chapter. (IP, V)
- Raffles held in conjunction with state and district conventions are not permitted due to liability concerns. Many state and district jurisdictions have restrictions with any “gambling” activity, particularly those that are held in hotels where alcohol is available. There are other legal restrictions about raffles being held in educational institutions and on college campuses. These restrictions regarding raffles have been adopted to avoid the potential liability for state and district chapters. (IP, V)
- Raffles at in-person provincial conventions may be permitted only with the approval of the provincial board and with the assurance that all local regulations are followed and any necessary permits are obtained. Though Canadian regulations allow more flexibility for these events at conventions, it is the responsibility of the provincial board to review and approve such fundraisers. (IP)

<ul style="list-style-type: none"> • Local and s/p/d chapters may solicit sponsors to underwrite fundraising activities and events and programs related to convention. Sponsorship may be made in the form of, but not limited to, cash contributions, prizes, advertising, invitations, gift certificates, meals, supplies or other related items. (IP, V) • Selection of sponsors should be in keeping with the image of P.E.O. and should be tasteful and appropriate. Sponsors may receive recognition in programs, kits and news releases at the event or at convention. Sponsor recognition shall be limited to company name and/or logo. No endorsement or advertising of company services or products is allowed. (IP, V) • Sponsors should be notified that while donations may be used to support the philanthropic projects of the P.E.O. Sisterhood, local and s/p/d chapters are not allowed to issue tax receipts. In other words, donations from sponsors do not qualify for a charitable deduction. (IP, V) • Questions regarding these guidelines should be directed to the director of finance/treasurer of International Chapter. (IP, V) 	<p>Sponsorship of Local & S/P/D Chapter Events & Convention Hostess Chapters</p>
<ul style="list-style-type: none"> • Hostess chapter groups must use the IRS number of their state or district chapter for all bank accounts. Adequate records should be maintained so that the amount held for the group is easily distinguished from the funds of the “holding” chapter. (IP, V) • Because the IRS will consider these funds assets of the state or district chapter, an annual accounting must be submitted in order to combine them with other state/district funds. At annual report time, the income, expenses and account balances must be reported to the treasurer of each state or district chapter using Form IRS-HC. The report should clearly identify the hostess group, including contact information for those responsible. (IP, V) • Although hostess group funds are held by a group of local chapters, the federal identification number determines ownership. By using the state’s tax identification number, the state or district officers assume responsibility for oversight and reporting. Annual reports (Form IRS-HC) from each hostess group should be submitted annually with the Annual Summary of Treasurer of State Chapter (Form IRS-SC) to the International Chapter treasurer’s office. (IP, V) 	<p>Hostess Groups for State or District Conventions</p>

LOCAL CHAPTERS IN NON-CHARTERED TERRITORY

<ul style="list-style-type: none"> • If bylaws and standing rules have not been amended during the year, the recording secretary of a chapter in non-chartered territory shall send an email or postcard in March to the organizer of International Chapter indicating “no change.” • If bylaws and standing rules have been amended during the year, the recording secretary of a chapter in non-chartered territory shall send a complete set of bylaws and standing rules to the organizer of International Chapter in March highlighting the changes made. <p>Note: Any formal action by convention which requires a change to local chapter bylaws and standing rules shall be made without a chapter vote (e.g., dues increase). The mandated change will require that bylaws and standing rules be sent to the organizer of International Chapter.</p>	Bylaws & Standing Rules
<ul style="list-style-type: none"> • Delegate <ul style="list-style-type: none"> ○ One delegate from every three local chapters or major fraction thereof in each non-chartered geographical area (e.g., state, province, territory) shall be elected. Designation of chapters entitled to elect a delegate shall be made by the organizer. Representation shall be on a rotating basis determined by the organizer. The president or a past president of the chapter shall be elected delegate when feasible. • Expenses <ul style="list-style-type: none"> ○ International Chapter will reimburse for one meal and pay expenses for housing for one extra night in advance of convention for delegates representing chapters in non-chartered territory. ○ Transportation is paid by the chapter(s) the delegate(s) represent. 	Convention of International Chapter
<ul style="list-style-type: none"> • Chapters in non-chartered territory shall send annually two copies of their yearbook to the organizer of International Chapter. • Reciprocity groups and P.E.O. Groups in non-chartered territory shall send annually one copy of their yearbook or schedule of meetings to the organizer of International Chapter. 	Yearbooks
<ul style="list-style-type: none"> • Each local chapter in Hawaii will be required by state law to pay an excise tax on all fundraising revenue. The P.E.O. Executive Office will prepare and file all necessary tax forms. Do not file any forms on behalf of your chapter or contact the Hawaii State Department of Revenue. Direct any questions to the Director of Finance/Treasurer of International Chapter, P.E.O. Executive Office. • The excise tax spreadsheets, sent to chapter presidents by email from the P.E.O. Executive Office, must be completed between March 1-15 and September 1-15 each year and returned by email to the executive office by the deadline. 	Excise Tax – Only for Chapters in Hawaii

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