

RECORDING SECRETARY



Take minutes!

- Record what was **done** at the meeting – **not** what was said
- Record just the facts, neutrally, without reflecting your personal opinion on any chapter decisions.

Remember:

Minutes can distributed via email but requires a bylaw change to do so in the chapter.

Minutes of Chapter _____

Meeting Date _____

The **regular (special) in-person/hybrid/virtual meeting** of Chapter _____ was held on (date) _____ at (time) _____. (If in-person or hybrid meeting, include the following: in the home of _____ with _____ serving as co-hostess.) (If this is an official visit, include the following: The Procedure for a P.E.O. Chapter Meeting was exemplified for the visiting officer.)

By general consent, (name) _____ served as (office) _____ and (name) _____ served as (office) _____.

The chaplain read **devotions** from _____. (OR: The chaplain conducted the devotions.)

The meeting was opened in due form by the president.

(If a special meeting, include only those items of business for which the meeting was called.)

The **minutes** of the previous meeting(s) were approved as read/corrected.

(If the letter accepting the invitation to membership for the initiate has not previously been read: The corresponding secretary read the letter accepting the invitation to membership from _____.)

_____ was/were **initiated**.

_____ members responded to **roll call** and _____ came in after the roll was called.

(If a member is accepted by transfer, at the meeting when her letter of acceptance is read: _____ members responded to **roll call** and one member was later accepted by transfer.)

The following visitors were introduced: _____ and _____.

The **treasurer** reported for the month(s) of _____:

- total receipts _____
- total disbursements _____
- total chapter assets _____

_____ moved to allow a bill/bills in the amount of \$ _____ for _____. The bill(s) was/were allowed.

The **corresponding secretary** reported the following:

- Submitted the Member Update form to the P.E.O. Membership Department for the initiation of _____, transfer accepted for _____, reinstatement of _____, change of address for _____, change of name for _____ and death of _____.
- Submitted the Notice of Member in your Area for _____.
- Sent invitation to membership to _____.
- Sent invitation to transfer to _____, Chapter _____.

Recording Secretary Documents

- Template for Minutes of Local Chapter Meeting
- Instructions for Taking Minutes

ONE ADDITIONAL DUTY

For the Recording Secretary

- Send your updated bylaws to the AL State Secretary each March if your bylaws have changed.

CORRESPONDING SECRETARY (ADAPTED FROM INTERNATIONAL)



THREE KEY AREAS



1

**Tools
and
Tips**

2

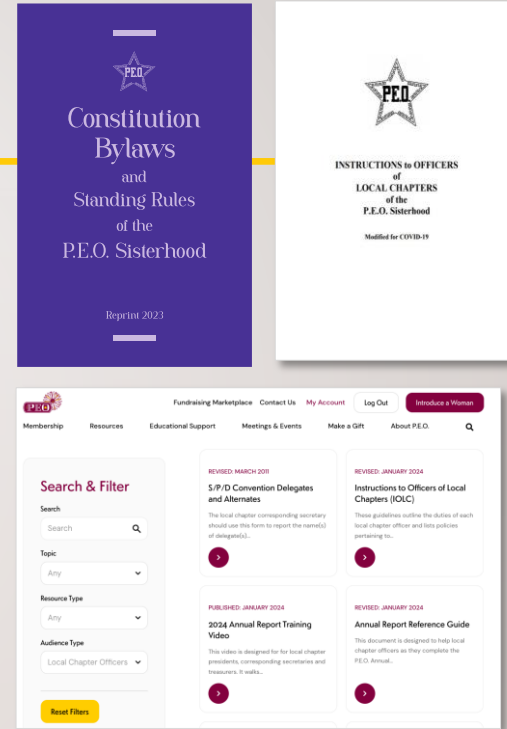
**Membership
Records**

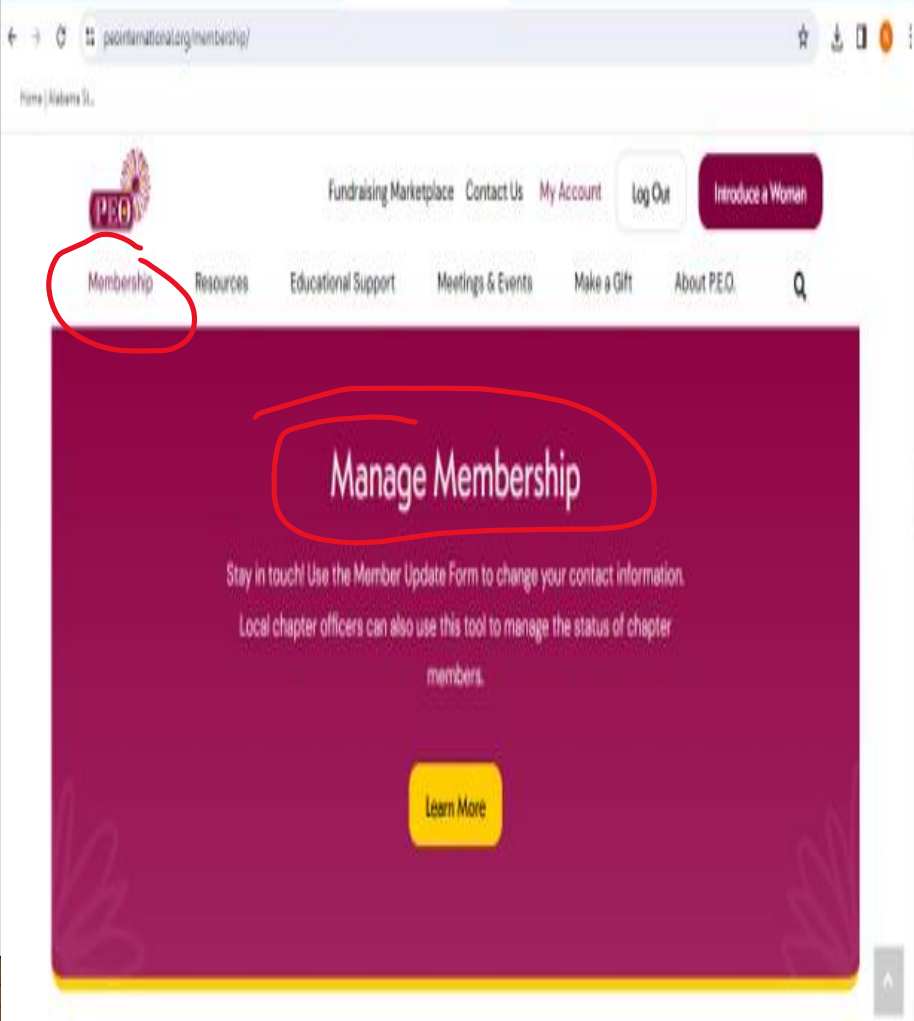
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**Annual
Reports** ➤

I Tools

- Officer Transition Meeting
- Constitution
 - Part III, ARTICLE V, Sec. 5
- Instructions to Officers of Local Chapters (IOLC)
- Local Chapter Officers resources on the P.E.O. International website ➤





- Here's where to find the "Member Update Form"
- Manage membership information by using the "Member Update Form"
- Invitations are paper instruments purchased from International.

I Tips

- Corresponding secretary's monthly report to chapter
 - The report of correspondence **sent** (including forms submitted online) is given only at the **first** regular meeting of the month.
 - If no correspondence was sent, the report is "No correspondence was sent."
- Reading correspondence received
 - Correspondence **received** is read or reviewed at **every** regular meeting.
 - State the name of the sender before reading the message.
 - Electronic correspondence received may be distributed prior to the meeting and noted in your report.
 - If no correspondence was received, the report is "No correspondence was received."

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Tips

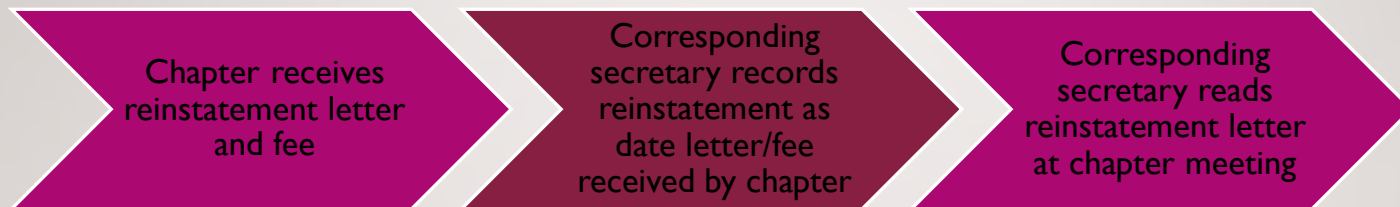
- Reading the Annual Report to your chapter
 - Note final membership count, total active, members becoming inactive and any other membership changes.
- Reading notification of transfer out
 - Note the date of the member's transfer with your chapter records.

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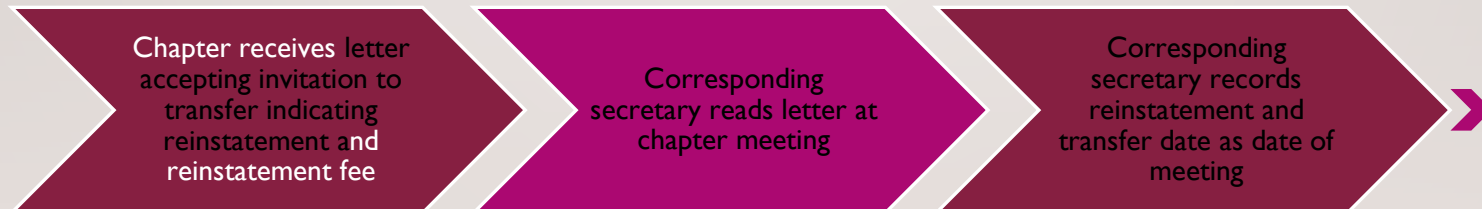


I Tips

- Reinstatement *In the same chapter*



- Reinstatement and Transfer



2

Membership Records

- Member ID
 - Only number to track P.E.O. members
 - Member ID, chapter letter(s) and state/provincial/ district abbreviations are printed on the back mailing panel of The

Record

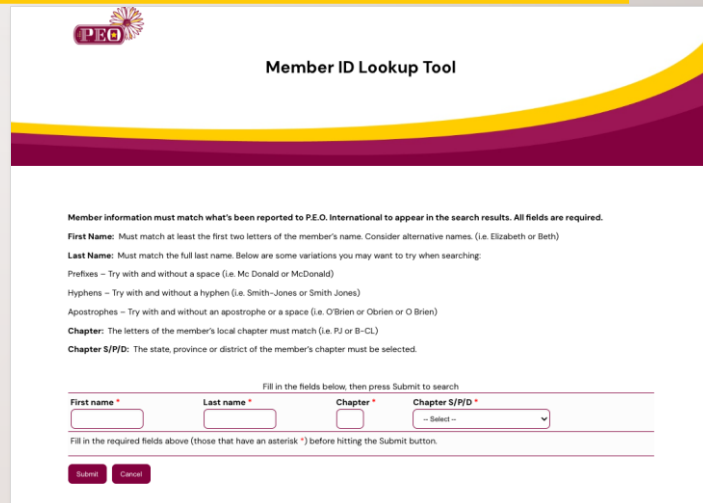
Chapter letters/ state or provincial abbreviation	**ABC-DE	LOT**F-123	MIX COMAIL
	AA\IA	1234567	P.E.O. ID number
	0_123_456789	0123 4 567890	1234567
	MARGUERITE MERRYWEATHER		
	12345 STARDUST DR		
	DAISYTOWN IA 12345-6789		

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2 Membership Records

- Member ID
 - ID numbers can also be found by doing a search on the P.E.O. International website.
 - **Membership > [Member ID Search](#)**



The screenshot shows the 'Member ID Lookup Tool' interface. At the top left is the P.E.O. logo. The title 'Member ID Lookup Tool' is centered. Below the title, a note states: 'Member information must match what's been reported to P.E.O. International to appear in the search results. All fields are required.' The form includes four labeled sections: 'First Name' (with instructions to match at least the first two letters), 'Last Name' (with instructions to match the full last name and examples of prefixes, hyphens, and apostrophes), 'Chapter' (with instructions to match the letters of the local chapter), and 'Chapter S/P/D' (with instructions to select the state, province, or district). Each section has a corresponding input field. Below the fields, a note says: 'Fill in the required fields above (those that have an asterisk *) before hitting the Submit button.' At the bottom are 'Submit' and 'Cancel' buttons.

Member ID Lookup Tool

Member information must match what's been reported to P.E.O. International to appear in the search results. All fields are required.

First Name: Must match at least the first two letters of the member's name. Consider alternative names. (i.e. Elizabeth or Beth)

Last Name: Must match the full last name. Below are some variations you may want to try when searching:
Prefixes – Try with and without a space (i.e. Mc Donald or McDonald)
Hyphens – Try with and without a hyphen (i.e. Smith-Jones or Smith Jones)
Apostrophes – Try with and without an apostrophe or a space (i.e. O'Brien or Obrien or O'Brien)

Chapter: The letters of the member's local chapter must match (i.e. PJ or B-CL)

Chapter S/P/D: The state, province or district of the member's chapter must be selected.

Fill in the fields below, then press Submit to search

First name * Last name * Chapter * Chapter S/P/D *

 -- Select --

Fill in the required fields above (those that have an asterisk *) before hitting the Submit button.

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2 Membership Records

- Member Update form
 - Form notifying P.E.O. Membership Department of all membership activity in your chapter, including a member's change in name and/or address and/or email address
 1. **Only** form used for this purpose
 2. Important to expediently submit this form
 3. Also make entries in your chapter membership records
 - If the P.E.O. Membership Department receives a change of address submitted directly by a member, a notification email will be sent to the corresponding secretary.



2 Membership Records

- Notice of Member in Your Area
 - Chapter member moves and wishes to transfer to another chapter
 1. Submit change of address and contact information on Member Update form (see previous slide).
 2. Complete the Notice of Member in Your Area.

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2 Membership Records

- Chapter Membership History (CMH)
 - Historical record of membership
 - Retain for the life of the chapter.
- General Enrollment Book
 - Keep in the corresponding secretary supplies for the life of the chapter.

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2 Membership Records

- Membership Roster
 - Shows details of membership that occurred during the past year.
 - Use as a reference when completing the Annual Report.



3

Annual Reports

- Annual Report
 - Official annual report representing your chapter's membership
 - Due by **March 10** each year
 - Separate training video on P.E.O. International website
 - Provide input on records
 1. Report of Election of Officers of Local Chapters
 2. Local Chapter Report of Project Chairs
 3. State/Provincial/District Convention – Delegates and Alternates
 4. International Convention – Nominee for Delegate
(select chapters in odd-numbered years only)

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FORMS & PROCESS FOR MEMBERSHIP ACTIVITY

Member Activity	Action	Submit
Initiation	Confirm contact information with the initiate.	Member Update form
Transfer In	Confirm contact information with the transferring member.	Member Update form
Transfer Out	N/A (notice sent to chapter from Membership Dept. -- read under correspondence in chapter meeting)	N/A
Reinstatement	Confirm contact information with the reinstating member and fee paid.	Member Update form
Death	Confirm accurate date of death for the Member Update form.	Member Update form
Member Becomes Inactive	Treasurer to report via the Membership Roster on the annual report. No action necessary by Corresponding Secretary.	Annual Report
Name Change	Confirm accurate name for the change. Member(s) can also update their information via the Member Update form.	Member Update form
Notice of Member in Your Area	Record information on Notice of Member In Your Area form for member moving to another community.	Notice of Member in Your Area Member Update form with change of address
Election of Officers	Complete Report of Election of Officers of Local Chapters.	Report of Election of Officers of Local Chapters
Change of Address for Officers	Record information on Report of Election of Officers of Local Chapters.	Report of Election of Officers of Local Chapters Member Update form
Change of Address (mail and/or email)	Complete Member Update form or confirm that member is reporting the change.	Member Update form

Forms you may need!.



INVITATION TO TRANSFER

Chapter _____ State _____ Chapter _____

extends a cordial invitation to

to transfer to

Chapter _____

Corresponding Secretary _____

Street Address _____

City _____

State/Province _____

Zip/Postal Code _____

RESPONSE TO INVITATION:

1. Acknowledge this Invitation to Transfer when received. You have six calendar months in which to accept or regret.
2. Accept or regret the invitation in writing.
3. Advise any other chapters that may have extended invitations to transfer to you.
4. Remember, a transfer may not occur in February. If there is not time for your acceptance letter to be read at a chapter meeting by January 31, your dues must be paid to your current chapter.



Send/receive invitation to Membership and Invitation to Transfer.

Note: No transfers in February but you can initiate in February!

*Note: If a member is initiated in February, she will need to pay the \$35 initiation fee for that year **in addition to** next year's dues.*

RESOURCES

Guard

- [Guard's Instructions for COI](#)

Chaplain

- [Chaplain's Prayer Card](#)

Recording Secretary

- [Minutes Template](#)
- [Instructions for Minutes](#)
- [Recording Secretary Training Video](#)

Corresponding Secretary

- [Monthly Report](#)
- [Local Chapter Corresponding Secretary Forms:](#)
 - [State Convention Delegates](#)
 - [Local Chapter Report of Project Chair](#)
 - [Report of Election of Officers of Local Chapter](#)
 - [Member Update](#)
- [Corresponding Secretary Training Video](#)

RESOURCES

Treasurer

- [Roll Call](#)
- [Monthly Report to Chapter](#)
- [Order Supplies](#)
- [Chapter Contribution Form](#)
- [P.E.O. Pyramid of Giving](#)
- [Notice of Dues](#)
- [Instructions for Treasurer's Record Book](#)
- [Treasurer Training Video](#)
- [P.E.O. Treasurer's Excel File Instructions](#)

President/Vice President

- [List of Supplies for Local Chapter Officers](#)
- President's Book:
 - [Procedure for P.E.O. Chapter Meeting](#)
 - [Procedure for Special P.E.O. Chapter Meeting](#)
 - [Appendix of Supplementary Procedures](#)
- [Bylaws & Standing Rules of the AL State Chapter](#)

Annual Report

- [Local Chapter Annual Report Reference Guide](#)
- [P.E.O. Electronic Reporting Training](#)
- [IRS-LC Worksheet](#)



THANK YOU FOR SERVING!!!!

