



**INSTRUCTIONS to OFFICERS  
of  
LOCAL CHAPTERS  
of the  
P.E.O. Sisterhood**

Last Reviewed and Updated 2026

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# INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) PRESIDENT

**Instructions may be downloaded from the P.E.O. Hub, which can be accessed by logging into the International website at <https://peointernational.org>.**

## RETENTION RECORD

TYPE OF RECORD	Retention (hard copy/electronic)
<b>Retain or destroy material in accordance with this record.</b>	
Applications for International Chapter project funds and local chapter funds	Destroy all electronic and hard copy personal financial/identifying information after decision is made (award/grant/loan is granted or denied); not applicable to vote recorded in chapter minutes
Chapter Charter	Life of chapter (may be preserved by a chapter historian at the discretion of the chapter)
Chapter IRS identification number (U.S. chapters only)	Life of chapter
Local Chapter Dues Form (formerly Annual Dues Report of Treasurer)	Six years
Local chapter president's annual letters (required for chapters in non-chartered territory; otherwise, if letter required by state/provincial/district [s/p/d] bylaws)	Life of chapter, if required
P.E.O. Photograph and Publicity Consent Form completed by project applicants/recipients (president or committee retention)	Retain in chapter records for six years
Scrapbooks and other chapter memorabilia	May be preserved by a chapter historian at discretion of the chapter in accordance with archival policy. Refer to Policies section of IOLC <a href="#">Archival Storage for Minutes and/or Historic Memorabilia</a> .
Sponsor for Membership forms complete with three signatures	Destroy after balloting is recorded in minutes and minutes are approved

<b>GENERAL INFORMATION</b>	
<ul style="list-style-type: none"> <li>• Study all instructions in the President’s Book.</li> </ul>	<b>President’s Book</b>
<ul style="list-style-type: none"> <li>• Study Part III of the Constitution, bylaws and standing rules of local, s/p/d and International chapters.</li> </ul>	<b>Constitution, Bylaws &amp; Standing Rules</b>
<ul style="list-style-type: none"> <li>• Have available the required supplies for office as shown on List of Supplies for Officers of Local Chapters.</li> <li>• Supplies available on the P.E.O. Hub may be printed as needed. A recommended best practice is to keep a current version of the IOLC in the President’s Book for reference during chapter meetings.</li> </ul>	<b>Supplies of Office</b>
<ul style="list-style-type: none"> <li>• The Proceedings of Convention of International Chapter may be accessed on the P.E.O. Hub.</li> <li>• Printed copies of the proceedings are not required to be kept.</li> </ul>	<b>Proceedings of Convention of International Chapter</b>
<ul style="list-style-type: none"> <li>• Access to s/p/d convention proceedings is identified in s/p/d bylaws. Contact a s/p/d officer if unable to locate current proceedings.</li> </ul>	<b>Proceedings of Convention of S/P/D Chapter</b>
<ul style="list-style-type: none"> <li>• Call special meetings of the chapter when needed. Refer to Appendix 2 of the President’s Book for a list of business that may be transacted in a special meeting.</li> </ul>	<b>Special Meetings</b>
<ul style="list-style-type: none"> <li>• The president may appoint an assistant for any officer, except for the office of president. The name of the assistant may be listed in the chapter yearbook. Only one officer is elected and installed. The vice president serves as the president’s assistant and presides when she is absent. If the president vacates her office, the vice president assumes the office. She is not installed.</li> <li>• Vacancy in office, except that of president, is filled by appointment made by the president and approved by vote of the chapter. (Constitution, Part III, ARTICLE IV, Sec. 5) The appointed officer is not installed.</li> </ul>	<b>Officer Assistants &amp; Vacancies</b>
<ul style="list-style-type: none"> <li>• Chapters receive an official visit as identified in the s/p/d bylaws. Chapters are not required to have an official visit during a vacation period (if so defined in the chapter bylaws). A chapter unable to be visited after an advance notice of 30 days shall be required to pay the expenses of the s/p/d or International officer’s official visit at another time. Refer to Constitution, Part III, ARTICLE III, Sec. 5. Refer to the bylaws and standing rules of the s/p/d chapter for provision for housing and meals of the s/p/d officer at the time of the official visit or, if in non-chartered territory, refer to the Constitution, Part I, ARTICLE VIII, Sec. 4.</li> </ul>	<b>Official Visit of Chapter</b>
<ul style="list-style-type: none"> <li>• Arrange for current president’s and treasurer’s signatures on bank account(s). Only active members may be a signer on a chapter’s bank account(s).</li> <li>• Call for presentation of an annual budget and acceptance by chapter vote, if applicable.</li> <li>• Call for acceptance of the Audit Committee’s annual report of the treasurer’s books by a vote of the chapter at a meeting in March or April.</li> </ul>	<b>Chapter Finances/Audit</b>
<ul style="list-style-type: none"> <li>• It is the chapter’s decision to recite the Lord’s Prayer at chapter meetings.</li> </ul>	<b>Lord’s Prayer</b>

<ul style="list-style-type: none"> <li>• Instructions to delegates to convention of s/p/d (or International) chapters are furnished prior to convention by the president of the s/p/d chapter or, if in non-chartered territory, by the organizer of International Chapter.</li> <li>• If the chapter is entitled to two delegates to convention of s/p/d chapter, the alternate first elected fills the first vacancy.</li> <li>• If required by s/p/d bylaws and standing rules, the convention report may be given during new business or after close of meeting. If the latter, the president makes an announcement so it is recorded in the minutes.</li> </ul>	<p style="text-align: center;"><b>Convention</b> (Constitution, Part I, ARTICLE II and ARTICLE III; Part II, ARTICLE III and ARTICLE IV)</p>
<ul style="list-style-type: none"> <li>• Each member requiring assistance due to a disability is to be accommodated if possible.</li> <li>• A recording secretary with hearing limitations may record the meeting to assist with minutes creation. She is to delete/erase the recording when the minutes are complete.</li> <li>• See the resource noted below for members with visual impairments.</li> </ul>	<p style="text-align: center;"><b>Members with Disabilities</b></p>
<ul style="list-style-type: none"> <li>• Resources available in Braille for officers from the P.E.O. Supply Department include the Procedure for P.E.O. Chapter Meeting, Procedure for Special P.E.O. Chapter Meeting, Appendix of Supplementary Materials, the Ceremony of Installation, the Ceremony of Initiation and the Chaplains' Prayer Card. The Opening Ode and Objects and Aims are available for local chapter members. Large-print versions of these items are also available.</li> </ul>	<p style="text-align: center;"><b>Resources Available in Braille</b></p>
<ul style="list-style-type: none"> <li>• Write an annual letter to an officer of the s/p/d chapter as required by the bylaws and standing rules of the s/p/d chapter. In non-chartered territory, write a brief annual letter to the organizer of International Chapter informing her of the condition and activities of the chapter. Annual letters shall be kept for the life of the chapter in the president's supplies.</li> <li>• The annual letter (if required) shall be read as an item of new business, approved at a chapter meeting in February and sent before March 1.</li> </ul>	<p style="text-align: center;"><b>Chapter President's Annual Letter</b></p>

<p><b>SUPERVISION OF OFFICERS</b></p>	
<ul style="list-style-type: none"> <li>• Following election, call a meeting of the officers for instruction in their duties. (Constitution, Part III, ARTICLE V, Sec. 1)</li> <li>• Deliver all books, papers and supplies to successor at the expiration of term of office and train successor on the duties and responsibilities of the office.</li> <li>• Coordinate the work of all offices. Be thoroughly familiar with procedures, regulations and supplies of all officers.</li> <li>• Make certain all officers' supplies are complete and a sufficient number of items, not available on the P.E.O. Hub, are on hand. Refer to current List of Supplies for Officers of Local Chapters.</li> </ul>	<p style="text-align: center;"><b>Officer Transition/ Supplies</b></p>

<b>ANNUAL REPORTS</b>	
<ul style="list-style-type: none"> <li>The Membership Roster, Local Chapter Dues Form and Annual Summary of Treasurer of Local Chapters (IRS-LC) (for U.S. chapters) collectively comprise the annual report. Unless specified, use of the term annual report will incorporate all three forms.</li> </ul>	<b>Definition</b>
<ul style="list-style-type: none"> <li>Verify the corresponding secretary has accurately reported the local chapter officer names and email addresses on the P.E.O. Hub. The emails on record must be for those serving as of February 28/29.</li> <li>Ask the corresponding secretary to read the names of inactive members to the chapter from the previous year's Membership Roster (available in the Reports section of the P.E.O. Hub) to verify current contact information. This is to be accomplished prior to the end of February.</li> <li>As directed by International Chapter, receive confirmation from the corresponding secretary that all chapter member names, addresses (including email), phone numbers and dates of membership changes (e.g., transfers, initiations) have been reported by the stated due date.</li> <li>Prior to March 1, determine potential need by member(s) for assistance with dues. Coordinate with treasurer and refer to <a href="#">Treasurer Dues Advancement</a> section for more detail.</li> </ul>	<b>Preparation</b>
<ul style="list-style-type: none"> <li>Review the annual report before approving and submitting. In the absence of the president, the vice president shall contact the P.E.O. Executive Office for access to approve on behalf of the president.</li> <li>Call for the reading of the annual report release by the corresponding secretary with the first monthly report following approval.</li> </ul>	<b>Approved Annual Reports</b>

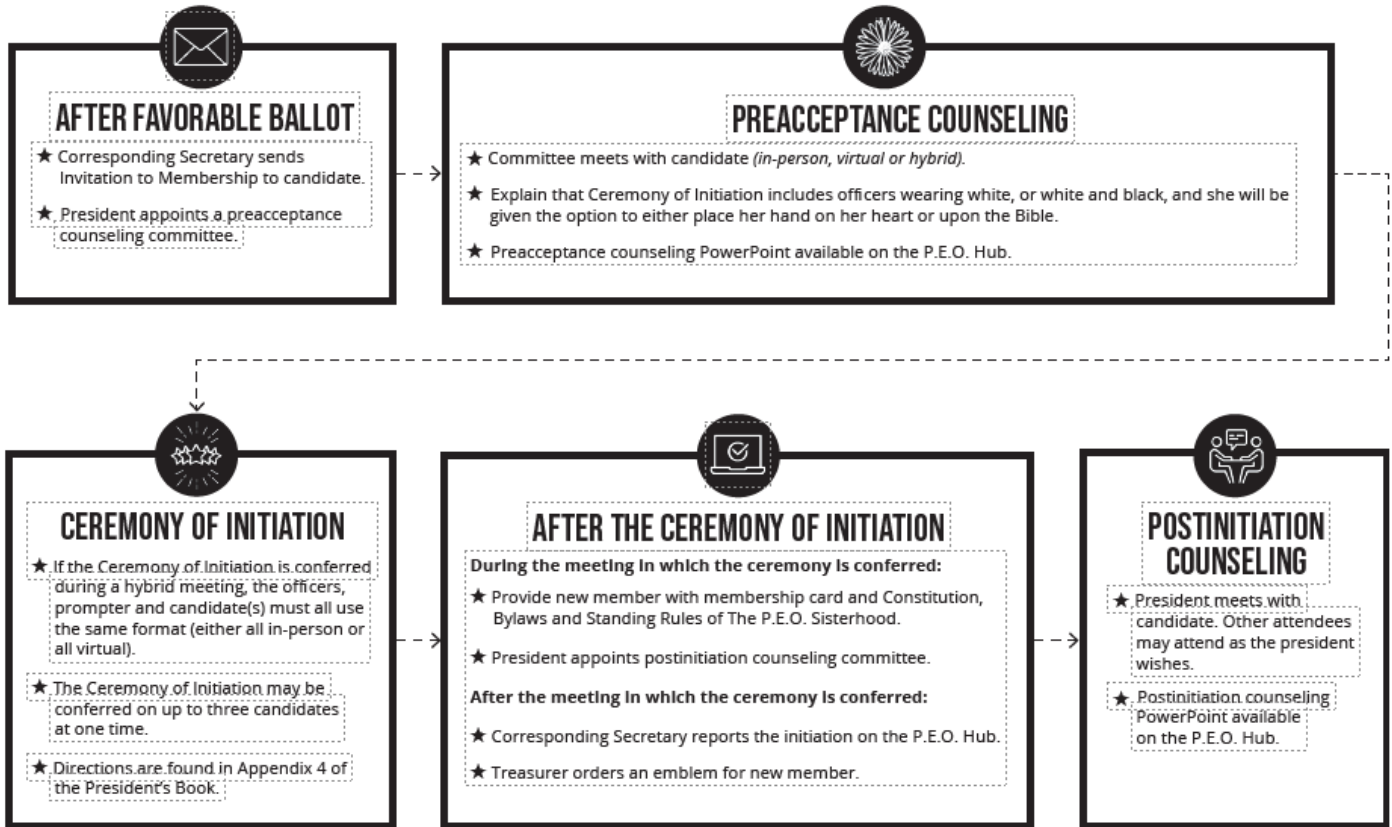
**BALLOTING FOR MEMBERSHIP**

<ul style="list-style-type: none"> <li>• Refer to Vice President’s section of IOLC <a href="#">Balloting for Membership</a> for detailed instructions on balloting.</li> <li>• If the vice president is attending virtually, the president will appoint an assistant to perform the vice president’s in-person duties during balloting. The videoconferencing platform must allow for confidential and contemporaneous balloting/polling/voting. Members joining by phone will send their ballots and votes to the president by email or text.</li> <li>• After the written ballots are counted by the president and recording secretary, the recording secretary will seal ballots in an envelope. Immediately after meeting, the recording secretary will destroy the written ballots. All ballots received from videoconferencing or telephone conference, including emails and texts, must be deleted.</li> <li>• If a member is visually or otherwise impaired, the president shall offer to assist her with voting.</li> <li>• Number of unfavorable votes on any ballot shall not be revealed.</li> <li>• If balloting for membership is conducted virtually, the vice president has no official function.</li> </ul>	<p><b>Balloting Procedure</b></p>
<ul style="list-style-type: none"> <li>• When more than one name is balloted upon at the same meeting, president repeats the voting instructions provided within Procedure for Chapter Meeting Order of Business #13 in the President’s Book. For in-person or hybrid meetings, the process for distributing and collecting ballots is repeated (refer to Balloting Procedure above).</li> </ul>	<p><b>Balloting Upon More than One Name</b></p>

<b>INITIATION</b> <b>(Constitution, Part III, ARTICLE VI)</b>	
<ul style="list-style-type: none"> <li>• See that the corresponding secretary sends the Invitation to Membership to the prospective member immediately following the favorable ballot. If the invitation is accepted, the candidate must acknowledge her belief in God in her acceptance letter. (Constitution, Part III, ARTICLE VI, Sec. 1)</li> <li>• Immediately following a favorable ballot, the president shall appoint a committee to counsel with the prospective member, preferably from sponsors. The president serves as chair. Use the P.E.O. Preacceptance Counseling PowerPoint available on the P.E.O. Hub and/or the P.E.O. Counsel for Membership Booklet.</li> <li>• A copy of the brochure A Guide for When You Are Invited may be provided to the prospective member. Membership brochures are available on the P.E.O. Hub or from the P.E.O. Supply Department.</li> <li>• Make certain the candidate is informed that the officers wear white, or white and black, and that she has the option to either raise her hand or place her hand upon the Bible when taking her vows.</li> <li>• Give the candidate an opportunity to read the Constitution before initiation.</li> </ul>	<b>Preacceptance Actions</b>
<ul style="list-style-type: none"> <li>• Schedule a rehearsal for the Ceremony of Initiation, whether the ceremony is virtual, memorized or read from the booklets, for all officers, as often as necessary.</li> <li>• Before the initiation meeting, give the candidate instructions about procedures of the ceremony and signing of the President’s Book. If there is to be balloting, explain the procedure to the candidate before the meeting. If initiation will be presented virtually, an emblem and the Virtual Ceremony of Initiation Pledge Form will also need to be provided in advance.</li> </ul>	<b>Preinitiation Actions</b>
<ul style="list-style-type: none"> <li>• At the chapter’s discretion, the Ceremony of Initiation may be read from the P.E.O. Ceremony of Initiation booklets provided by International Chapter. If the official booklets are used, each participant is required to hold her booklet during the Ceremony of Initiation. An exception may be made for the president who memorizes. <ul style="list-style-type: none"> <li>○ The president shall be prepared to give the Special Work to the s/p/d (International) organizer (or her proxy) at the time of an official visit.</li> </ul> </li> <li>• Either exemplify the Ceremony of Initiation or initiate a candidate once during the chapter year. (Consult s/p/d bylaws and standing rules for any additional requirements.)</li> <li>• The president may appoint a proxy to stand in for an officer in the Ceremony of Initiation. If a participant is unable to be present for initiation due to an emergency, the president may appoint a member of the chapter to stand in her place. The prompter reads the part unless the ceremony is read from the official booklets by all participants. <ul style="list-style-type: none"> <li>○ The president may invite active members of other chapters to participate as proxy officers in the ceremony.</li> </ul> </li> </ul>	<b>Exemplification of Ceremony of Initiation</b>

<ul style="list-style-type: none"> <li>• Keep a record of to whom the P.E.O. Ceremony of Initiation booklets are lent and when they are returned.</li> <li>• The order for a lost (or worn) P.E.O. Ceremony of Initiation booklet will be verified by the P.E.O. Supply Department with the organizer of the s/p/d chapter or, if in non-chartered territory, the organizer of International Chapter. Upon written approval, replacement booklet(s) will be sent.</li> </ul>	<p><b>P.E.O. Ceremony of Initiation Booklets and Orders for a Lost or Worn P.E.O. Ceremony of Initiation Booklet</b></p>
<ul style="list-style-type: none"> <li>• Upon receipt of a new initiatory emblem, the chapter shall return the old emblem to the P.E.O. Supply Department.</li> <li>• A chapter is required to purchase a replacement official initiatory emblem as needed.</li> </ul>	<p><b>Initiatory Emblem</b></p>
<ul style="list-style-type: none"> <li>• The Ceremony of Initiation may be conferred during             <ul style="list-style-type: none"> <li>○ an in-person meeting or</li> <li>○ a fully virtual meeting or</li> <li>○ a hybrid meeting provided all of the Ceremony of Initiation officers, the prompter and the candidate(s) are attending either all in person or all virtually.</li> </ul> </li> <li>• No photos of the initiatory emblem may be taken for any reason. This includes screenshots during a virtual Ceremony of Initiation. Photos of the initiate(s) and members are allowed after the meeting is adjourned.</li> <li>• Treasurer will present a membership card and provide electronic access to or a hard copy of the Constitution to the new member.</li> <li>• For a virtual Ceremony of Initiation, please see additional guidance in Appendix 4 of the President’s Book.</li> </ul>	<p><b>Initiatory Meeting</b></p>
<ul style="list-style-type: none"> <li>• Direct treasurer to order an emblem (pin) for the new member. (Emblem may not be ordered before initiation.)</li> <li>• Confirm that the corresponding secretary has reported the initiation on the P.E.O. Hub.</li> <li>• Appoint a committee for a conference with the initiate. The committee may be a standing committee. Use the P.E.O. Counsel for Membership Booklet.</li> <li>• Explain the fixed time for payment of dues and assessments. Dues are payable in advance. If initiation occurs in February, dues for the coming year must be paid prior to March 1; if initiation occurs in March or thereafter, dues are paid prior to March 1 of the <b>following</b> year. (Constitution, Part III, ARTICLE VIII)</li> <li>• No changes shall be made to a member’s original signature in the President’s Book.</li> </ul>	<p><b>Postinitiation Actions</b></p>

# INITIATION FLOWCHART



<b>INCREASE IN MEMBERSHIP – TRANSFERS IN</b>	
<ul style="list-style-type: none"> <li>• Be familiar with all requirements pertaining to transfers, with special reference to order of procedure for invitation to transfer and acceptance of transfer.                             <ul style="list-style-type: none"> <li>○ An inactive member may accept a chapter’s invitation to transfer if she indicates in her acceptance that she is reinstating and includes her reinstatement fee of \$50. Prior to March 1, 2026, the reinstatement fee is \$35.</li> </ul> </li> <li>• Ensure that the corresponding secretary promptly reports the transfer via the P.E.O. Hub.</li> <li>• An invitation to transfer may not be extended or accepted in February. An exception is made for an organizing or reorganizing chapter. (Constitution, Part III, ARTICLE X, Sec. 2)</li> <li>• A P.E.O. remains a member of her current chapter until the inviting chapter has accepted the transfer by reading her acceptance letter at a meeting.</li> </ul>	<b>Transfer In</b>

<b>DECREASE IN MEMBERSHIP</b>	
<ul style="list-style-type: none"> <li>• Notification of member transferring into another chapter shall be read as correspondence during the chapter meeting.</li> </ul>	<b>Transfer Out</b>
<ul style="list-style-type: none"> <li>• A member is inactive when her dues are not paid before March 1.</li> </ul>	<b>Inactive</b>
<ul style="list-style-type: none"> <li>• Following the death of a member, ensure that the corresponding secretary promptly reports the date of death on the P.E.O. Hub. Refer to President’s section of IOLC <a href="#">Emblems</a> for further instructions.</li> </ul>	<b>Death</b>

<b>EMBLEMS</b>	
<ul style="list-style-type: none"> <li>Refer to Treasurer’s section of IOLC <a href="#">Emblems</a> for instructions on replacing lost and/or exchanging emblems for active members.</li> </ul>	<b>Emblem Orders for Active Members</b>
<ul style="list-style-type: none"> <li>Refer to Treasurer’s section of IOLC <a href="#">Emblems</a> for instructions on ordering an emblem for reinstating members.</li> <li>If the reinstating member retained her pin at time of inactive status and has lost the emblem, or if the reinstating member’s pin was returned, the chapter shall purchase one from the P.E.O. Supply Department from a portion of her reinstatement fee.</li> </ul>	<b>Emblem Orders for Reinstating Member</b>
<ul style="list-style-type: none"> <li>Refer to P.E.O. Chapter Eternal Preferences form if completed by the member. Ascertain if the emblem was buried or cremated with the member or is being retained by her family. If not, secure the emblem and return it to the P.E.O. Emblem Division. It is recommended the emblems(s) be returned in a padded envelope. Be respectful when requesting the return of an emblem.</li> <li>Cremation is a form of burial. P.E.O. emblem may be enclosed with ashes in the cremation urn. If ashes are scattered and emblem is not being retained by her family, the emblem should be returned to the P.E.O. Supply Department.</li> <li>Gavel or other pin guard is not to be returned to the P.E.O. Supply Department.</li> </ul>	<b>Emblem Disposition for Deceased Member</b> (Constitution, Part III, ARTICLE VII, Sec. 4)
<ul style="list-style-type: none"> <li>Upon the death of a past president of a s/p/d chapter, ascertain if her recognition pin was buried or cremated with her. If not, secure the recognition pin and send it to the president of the s/p/d chapter. It is recommended the recognition pin be returned in a padded envelope.</li> </ul>	<b>Emblem Disposition for Past President of a S/P/D Chapter</b>
<ul style="list-style-type: none"> <li>Upon the death of a current or past president of International Chapter, secure the large emblem with a diamond in the upper point and send it to the executive director of the P.E.O. Sisterhood, 3700 Grand Avenue, Des Moines, IA 50312. It is recommended the emblem be returned in a padded envelope via tracked delivery. Such emblem shall not be buried or cremated with her.</li> </ul>	<b>Emblem Disposition for Current or Past President of International Chapter</b>

<b>EXPULSION AND/OR DISCIPLINARY ACTION</b>	
<ul style="list-style-type: none"> <li>A local chapter with a situation involving expulsion (Constitution, Part III, ARTICLE IX, Sec. 3) or disciplinary action (Constitution, Part III, ARTICLE XII) shall contact the s/p/d chapter president. The s/p/d president will notify the president of International Chapter.</li> </ul>	<b>Expulsion and/or Disciplinary Action</b>

# INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) VICE PRESIDENT

**Instructions may be downloaded from the P.E.O. Hub, which can be accessed by logging into the International website at <https://peointernational.org>.**

<b>GENERAL INFORMATION</b>	
<ul style="list-style-type: none"> <li>Study Part III of the Constitution, bylaws and standing rules of local, state/provincial/district (s/p/d) and International chapters.</li> </ul>	<b>Constitution, Bylaws &amp; Standing Rules</b>
<ul style="list-style-type: none"> <li>Deliver to successor all books, papers and supplies at the expiration of term of office and train successor on the duties and responsibilities of the office.</li> </ul>	<b>Officer Transition</b>
<ul style="list-style-type: none"> <li>Be familiar with the duties of the president and perform her duties when necessary.</li> <li>Become president in the event the president vacates her office.</li> </ul>	<b>Support to President</b>
<ul style="list-style-type: none"> <li>At the chapter's discretion, the Ceremony of Initiation may be read from the P.E.O. Ceremony of Initiation booklets provided by International Chapter. If the official booklets are used, each participant is required to hold her booklet during the Ceremony of Initiation. An exception may be made for the president who memorizes.</li> <li>The vice president shall be prepared to give the Special Work to the s/p/d (International) organizer (or her proxy) at the time of an official visit.</li> </ul>	<b>Ceremony of Initiation</b>
<ul style="list-style-type: none"> <li>Follow instructions from the president for a chapter meeting, balloting and initiation.</li> <li>Arrange for an appropriate container for balloting, as needed, with recording secretary or hostess.</li> </ul>	<b>Chapter Meeting Responsibilities</b>
<ul style="list-style-type: none"> <li>In the absence of the president, the vice president shall contact the P.E.O. Executive Office for access to approve on behalf of the president.</li> </ul>	<b>Annual Reports</b>

<b>BALLOTING FOR MEMBERSHIP</b>	
<ul style="list-style-type: none"> <li>• If the vice president is attending an in-person meeting – the vice president distributes a ballot to each member and then collects the ballots; after all balloting is complete, undistributed ballots are placed on president’s table.</li> <li>• If the vice president is attending virtually – the vice president has no official function during virtual balloting. The videoconferencing platform must allow for confidential and contemporaneous balloting/polling/voting. Members joining by phone will send their ballots and votes to the president by email or text.</li> <li>• If a member is visually or otherwise impaired, the president shall offer to assist her with voting.</li> <li>• For in-person balloting – after all ballots have been collected or submitted, the vice president presents container to the president and recording secretary. The president and recording secretary determine the vote.</li> <li>• Ballots must be counted only if there are three or more con votes on the first ballot.</li> <li>• If another ballot is to be taken, the president will repeat the balloting procedure.</li> </ul>	<p><b>Balloting Procedure</b></p>
<ul style="list-style-type: none"> <li>• When more than one name is to be balloted upon at the same meeting, the president repeats the voting instructions provided as order of business #13 of Chapter Procedure in the President’s Book.</li> </ul>	<p><b>Balloting Upon More than One Name</b></p>

# INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) RECORDING SECRETARY

Instructions may be downloaded from the P.E.O. Hub, which can be accessed by logging into the International website at <https://peointernational.org>.

## RETENTION RECORD

TYPE OF RECORD	RETENTION (hard copy/electronic)
<b>Retain or destroy material in accordance with this record.</b>	
Corresponding Secretary's Monthly Report to Chapter form	Destroy after report is recorded in minutes and minutes are approved
Instructions for Minutes, Recording Secretary's Record Book	Current
Minutes	<p>Life of chapter</p> <p>Minutes of chapter must be kept in their original form for a minimum of 10 years. This format includes electronic minutes with an electronic signature.</p> <p>Upon vote of chapter, minutes older than 10 years may be preserved in any manner in accordance with archival policy. Refer to Policies section of IOLC <a href="#">Archival Storage for Minutes and/or Historic Memorabilia</a>.</p>
Social Correspondence	Destroy after correspondence is recorded in minutes and minutes are approved
Treasurer's Monthly Report to Chapter form	<p>Keep until end of fiscal year and give to Audit Committee</p> <p>The Audit Committee is to destroy these reports after audit report is recorded in minutes and minutes are approved</p>

<b>GENERAL INFORMATION</b>	
<ul style="list-style-type: none"> <li>• Study all instructions in the President’s Book.</li> <li>• Retain or destroy material in accordance with instructions in the <a href="#">Retention Record</a>.</li> <li>• Read/review all papers not correspondence.</li> <li>• Correspondence received electronically and shared with all chapter members does not need to be read at a chapter meeting. It should be noted for inclusion in the minutes.</li> </ul>	<b>Basic Instructions</b>
<ul style="list-style-type: none"> <li>• Study Part III of the Constitution, bylaws and standing rules of local, state/provincial/district (s/p/d) and International chapters.</li> </ul>	<b>Constitution, Bylaws &amp; Standing Rules</b>
<ul style="list-style-type: none"> <li>• Meetings of the local chapter shall not be recorded to share after the meeting or retained for historical purpose.</li> <li>• A recording secretary with hearing limitations may record the meeting to assist with minutes creation. She is to delete/erase the recording when the minutes have been drafted.</li> </ul>	<b>Recording Meetings</b>
<ul style="list-style-type: none"> <li>• Have available the required supplies for office as shown on List of Supplies for Officers of Local Chapters. Forms available on the P.E.O. Hub may be downloaded when needed.</li> </ul>	<b>Supplies of Office</b>
<ul style="list-style-type: none"> <li>• Deliver to successor all books, papers and supplies at the expiration of term of office and train successor on the duties and responsibilities of the office.</li> </ul>	<b>Officer Transition</b>
<ul style="list-style-type: none"> <li>• In the absence of the president and vice president, call the chapter meeting to order and act as the chair until a chair pro tem is elected; said chair will serve for that meeting only. (Refer to Appendix 3 from the President’s Book.)</li> </ul>	<b>Chapter Meeting – Absence of Pres &amp; Vice Pres</b>
<ul style="list-style-type: none"> <li>• At the chapter’s discretion, the Ceremony of Initiation may be read from the P.E.O. Ceremony of Initiation booklets provided by International Chapter. If the official booklets are used, each participant is required to hold her booklet during the Ceremony of Initiation. An exception may be made for the president who memorizes.</li> </ul>	<b>Ceremony of Initiation</b>

<b>BYLAWS &amp; STANDING RULES</b>	
<ul style="list-style-type: none"> <li>Annually (immediately after March 1) include the local chapter bylaws and standing rules in the Recording Secretary’s Record Book. Include any amendments adopted during the past year following instructions in the front of the book. The instructions can also be found on the P.E.O. Hub.</li> </ul>	<b>Where to Maintain Copy</b>
<ul style="list-style-type: none"> <li>If local chapter bylaws and standing rules have been amended since the previous March 1, the recording secretary shall send a copy as instructed by the s/p/d executive board. Chapters in non-chartered territory send a copy to the organizer of International Chapter. The local chapter president is provided the current bylaws and standing rules for the President’s Book.               <ul style="list-style-type: none"> <li>If local chapter bylaws and standing rules were not amended since the previous March 1, the recording secretary will send notification of “No Change” as instructed by the s/p/d executive board. For chapters in non-chartered territory, notification indicating “No Change” shall be sent in March by the outgoing recording secretary to the organizer of International Chapter.</li> </ul> </li> </ul>	<b>Amended Bylaws &amp; Standing Rules</b>

<b>BALLOTING FOR MEMBERSHIP</b>	
<ul style="list-style-type: none"> <li>Refer to Vice President’s section of IOLC <a href="#">Balloting for Membership</a> for detailed instructions on balloting.</li> <li>After the written ballots are counted by the president and recording secretary, the recording secretary will seal ballots in an envelope. Immediately after meeting, the recording secretary will destroy the written ballots. All ballots received from videoconferencing or telephone conference, including emails and texts, must be deleted.</li> </ul>	<b>Balloting Procedure</b>
<ul style="list-style-type: none"> <li>A name balloted upon favorably shall be included in the minutes of the meeting at which the vote is taken, together with names of sponsors and the date the name was proposed for membership.</li> </ul>	<b>Favorable Ballot</b>
<ul style="list-style-type: none"> <li>The number of unfavorable votes on any ballot shall not be disclosed.</li> <li>A name balloted upon unfavorably shall not be recorded in the minutes.</li> </ul>	<b>Unfavorable Ballot</b>

<b>MINUTES</b>	
<ul style="list-style-type: none"> <li>Refer to Instructions – Recording Secretary’s Record Book. These instructions are also available on the P.E.O. Hub.</li> </ul>	<b>Instructions</b>
<ul style="list-style-type: none"> <li>Draft minutes of the local chapter shall not be distributed by postal service, email or fax except between the president, recording secretary and their pro tem unless distribution of draft minutes is provided for in the chapter bylaws.</li> <li>If the chapter allows for the sending of draft minutes to all members in their bylaws, they are to be sent by email or postal service to all members before the next regular or special meeting after review by the president.</li> <li>Final minutes are not to be distributed and are maintained by the recording secretary.</li> </ul>	<b>Distribution</b>
<ul style="list-style-type: none"> <li>If minutes are maintained in hard copy format, remove minutes from Recording Secretary’s Record Book when notebook is filled. Maintain in accordance with retention record (see Format).</li> </ul>	<b>Maintenance</b>
<ul style="list-style-type: none"> <li>Minutes shall be maintained in their original format for 10 years. This format includes electronic minutes with an electronic signature. A complete set of the chapter’s minutes shall be kept for the life of the chapter. Refer to P.E.O. Historical Collections Guidelines for Local Chapters, available on the P.E.O. Hub.</li> </ul>	<b>Format</b>

# INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) CORRESPONDING SECRETARY

Instructions may be downloaded from the P.E.O. Hub, which can be accessed by logging into the International website at <https://peointernational.org>.

## RETENTION RECORD

TYPE OF RECORD	RETENTION (hard copy/electronic)
<b>Retain or destroy material in accordance with this record.</b>	
Correspondence from officers of state/provincial/district (s/p/d) chapters	Give to appropriate local chapter officer or standing committee. It is not necessary for the corresponding secretary to retain.
General Enrollment Book (for chapters organized prior to March 1, 2010)	Life of chapter
Notice of member transferring to another chapter and social correspondence	Destroy after correspondence is recorded in minutes and minutes are approved.

**PROCESS FOR REPORTING MEMBERSHIP ACTIVITY FROM THE P.E.O. HUB DASHBOARD**

<b>Member Activity</b>	<b>Action</b>	<b>Navigation</b>
<b>Initiation</b>	Confirm and add contact information for the initiate.	P.E.O. Hub> My Chapter>Members>Add/Transfer
<b>Transfer In</b>	Find member in Member Search. Choose Member Information and click Transfer.	P.E.O. Hub> Member Search (After finding the member, click Transfer on the Member Information tab.)
<b>Transfer Out</b>	N/A (Notification of member transferring into another chapter will be received and shall be read as correspondence during the chapter meeting.)	N/A
<b>Reinstatement Into Same Chapter</b>	Confirm and edit, as needed, contact information for the reinstating member.	P.E.O. Hub> My Chapter>Members. Choose Inactive Members from User Type dropdown. Adjust the Inactive After date field if needed. (After finding the member, click Reinstatement on the Member Information tab.)
<b>Reinstatement Into Different Chapter</b>	For the transfer and reinstatement of a member into your chapter, confirm and edit, as needed, contact information for the reinstating and transferring member.	P.E.O. Hub> Member Search. Choose Inactive Members from the User Type dropdown. (After finding the member, click Reinstatement on the Member Information tab.)
<b>Death</b>	Confirm and enter accurate date of death.	P.E.O. Hub> My Chapter>Members. (After finding the member, click Edit on the Info tab and enter Death Date.)
<b>Member Becomes Inactive</b>	Treasurer to report via the Membership Roster on the annual report. No action necessary by corresponding secretary.	N/A
<b>Name/Contact Information Change (including Seasonal Addresses)</b>	Confirm accurate information for the change. Member(s) can also update their own information.	P.E.O. Hub> My Chapter>Members. (After finding the member, click Edit on the Info tab and enter change.)
<b>Election of Officers</b>	Report elected and installed officers of chapter.	P.E.O. Hub under My To-Do Items/Notices, complete the election of officers task.

<b>GENERAL INFORMATION</b>	
<ul style="list-style-type: none"> <li>• Study Part III of the Constitution, bylaws and standing rules of local, s/p/d and International chapters.</li> </ul>	<b>Constitution, Bylaws &amp; Standing Rules</b>
<ul style="list-style-type: none"> <li>• Deliver all books, papers and supplies to successor at the expiration of term of office and train successor on the duties and responsibilities of the office.</li> </ul>	<b>Officer Transition</b>
<ul style="list-style-type: none"> <li>• Keep on hand at all times the required supplies for office as shown on List of Supplies for Officers of Local Chapters.</li> <li>• Access official forms for office from the P.E.O. Hub, as needed, to ensure the most recent form is used.</li> </ul>	<b>Supplies of Office</b>
<ul style="list-style-type: none"> <li>• Conduct the correspondence of the chapter.                             <ul style="list-style-type: none"> <li>○ Refer to <a href="#">Process For Reporting Membership Activity</a> from the P.E.O. Hub Dashboard provided on page 2 for details.</li> </ul> </li> </ul>	<b>Duties</b>
<ul style="list-style-type: none"> <li>• Report to the chapter at the first meeting each month using Corresponding Secretary's Monthly Report to Chapter form or by indicating that no correspondence was sent.</li> <li>• The date on the report is the date of the chapter meeting. The report indicates correspondence sent and membership activities reported during the month and should state names to whom letters were written and the subject matter of each letter.                             <ul style="list-style-type: none"> <li>○ The report is filed with the recording secretary and copied in full in the minutes.</li> </ul> </li> <li>• Read/review correspondence received at each chapter meeting. Correspondence received electronically and shared with all chapter members does not need to be read at a chapter meeting. It should be noted under correspondence for inclusion in the minutes. When reading correspondence at a chapter meeting, note the sender of the correspondence before reading the message.</li> </ul>	<b>Reports and Correspondence Read at Chapter Meetings</b>
<ul style="list-style-type: none"> <li>• At the chapter's discretion, the Ceremony of Initiation may be read from the P.E.O. Ceremony of Initiation booklets provided by International Chapter. If the official booklets are used, each participant is required to hold her booklet during the Ceremony of Initiation. An exception may be made for the president who memorizes.</li> </ul>	<b>Ceremony of Initiation</b>

<b>CHAPTER MEMBERSHIP</b>	
<ul style="list-style-type: none"> <li>• As of March 1, 2010, each chapter's General Enrollment Book was replaced with a Chapter Membership History (CMH).                             <ul style="list-style-type: none"> <li>○ The CMH lists all P.E.O.s who have been a member of the chapter, except those who were deceased prior to 1980. Information about members who were deceased prior to 1980 may be found in the retired General Enrollment Book.</li> <li>○ Chapters organized before March 1, 2010, shall keep their General Enrollment Book for the life of the chapter.</li> </ul> </li> </ul>	<b>Records/Reports</b>
<ul style="list-style-type: none"> <li>• A Member ID # is assigned by the Membership Department for each P.E.O. and is to</li> </ul>	<b>Member ID #</b>

<p>be used for all membership records.</p> <ul style="list-style-type: none"> <li>○ Refer to IOLC section <a href="#">Glossary of Terms and Abbreviations</a> for Member ID # guidelines.</li> </ul>	
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<b>INCREASE IN MEMBERSHIP</b>	
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<ul style="list-style-type: none"> <li>● After successful balloting, and on direction of the president, send an Invitation to Membership to a candidate for membership.</li> <li>● Report the initiation. Refer to <a href="#">Process for Reporting Membership Activity</a> from the P.E.O. Hub Dashboard provided on page 2 for details. The order for the initiate’s emblem, submitted by your chapter’s treasurer, will not be processed by the P.E.O. Executive Office until this information has been received.</li> <li>● An initiate will be assigned a Member ID # and receive The P.E.O. Record after her initiation has been reported.</li> </ul>	<b>Initiation</b>
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<ul style="list-style-type: none"> <li>● Send an Invitation to Transfer following a favorable chapter vote.</li> <li>● Date of acceptance of the transfer is the date of the regular or special meeting at which the acceptance letter is read.</li> <li>● Refer to <a href="#">Process For Reporting Membership Activity</a> from the P.E.O. Hub Dashboard provided on page 2 for details.</li> <li>● If the acceptance letter is not received and read at a meeting before February 1, the member must pay her dues to her current chapter. An invitation to transfer may not be extended or accepted in February. An exception is made for an organizing or reorganizing chapter. (Constitution, Part III, ARTICLE X, Sec. 2)</li> <li>● In the case of a transferring member from a disbanded chapter, refer to the Constitution for procedure. (Part III, ARTICLE X, Sec. 2)</li> </ul>	<b>Transfer In</b>
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<ul style="list-style-type: none"> <li>● Report the reinstatement. Refer to <a href="#">Process for Reporting Membership Activity</a> from the P.E.O. Hub Dashboard provided on page 2 for details</li> <li>● A member’s reinstatement date is the date upon which her reinstatement letter and fee have been received by the chapter. <ul style="list-style-type: none"> <li>○ If reinstating member is also transferring in, refer to the Constitution for the procedure. (Part III, ARTICLE X, Sec. 4) Reinstatement fee must be included with her acceptance letter. The reinstatement date and date of transfer in are the date upon which her acceptance letter is read during a chapter meeting.</li> <li>○ Following reinstatement, a member, regardless of how many years she has been inactive, may be honored as a 50-year member upon reaching the anniversary of her initiation.</li> </ul> </li> </ul>	<b>Reinstatement</b>
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<b>DECREASE IN MEMBERSHIP</b>	
<ul style="list-style-type: none"> <li>When notification of a member's transfer to another chapter is received from the Membership Department, read the notification letter to the chapter. No other action is taken. The notification letter only informs that another chapter has accepted the member.</li> </ul>	<b>Transfer Out</b>
<ul style="list-style-type: none"> <li>Report the death. Refer to <a href="#">Process for Reporting Membership Activity</a> from the P.E.O. Hub Dashboard provided on page 2 for details</li> <li>Refer to the bylaws and standing rules of your s/p/d chapter for any additional reporting requirements.</li> </ul>	<b>Death</b>
<ul style="list-style-type: none"> <li>Inactive members are reported only after March 1 on the annual report.</li> <li>For questions about an inactive member for whom the chapter has lost contact, refer to Corresponding Secretary's section of IOLC <a href="#">Annual Reports</a> instructions.</li> </ul>	<b>Inactive</b>

<b>MEMBER INFORMATION</b>	
<ul style="list-style-type: none"> <li>No changes in the original signature of a member shall be made in the President's Book.</li> <li>Hyphenate only if the member wishes to use two surnames.</li> </ul>	<b>Change of Name</b>
<ul style="list-style-type: none"> <li>Multiple options are available for submitting a member's change of address:               <ul style="list-style-type: none"> <li>Corresponding secretary may report a member's change of address (mailing and email) for both active and inactive members.</li> <li>A member may report her own change of address by:                   <ul style="list-style-type: none"> <li>Editing on the P.E.O. Hub. <i>OR</i></li> <li>Calling 515-255-3153.</li> </ul> </li> </ul> </li> </ul>	<b>Change of Address</b> (mailing and email)
<ul style="list-style-type: none"> <li>A member wishing to visit other chapters with the possibility of transferring membership (within her own town or in another town) should be encouraged to start the Seeking a Transfer process on the P.E.O. Hub. If a member is moving to a city in non-chartered territory where there is no chapter or to a foreign country, contact the Membership Department.</li> </ul>	<b>Seeking a Transfer</b>

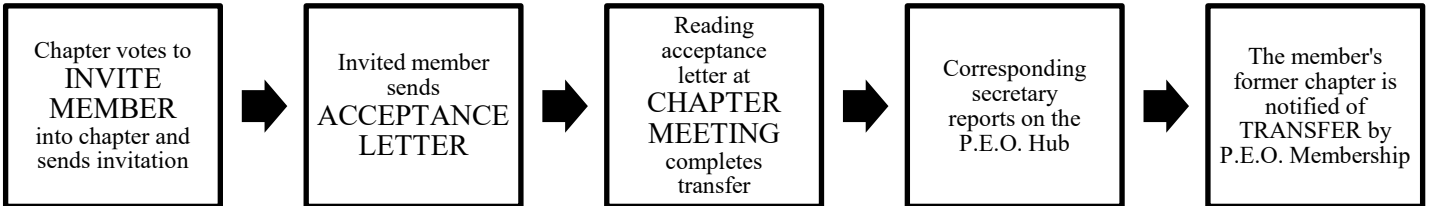
<b>ELECTIONS</b>	
<ul style="list-style-type: none"> <li>Immediately after installation of officers in March (Constitution, Part III, ARTICLE IV, Sec. 1) report elected and installed officers of your chapter.</li> <li>If an officer is unable to be present at the March installation, do not report her as an officer until after she is installed.</li> </ul>	<b>Report of Election of Officers</b>

<ul style="list-style-type: none"> <li>Immediately after election, make the appropriate online entries to report the name(s) of delegate(s) and alternate(s) elected to convention of s/p/d chapter.</li> </ul>	<p><b>Delegate to Convention</b> (s/p/d conventions)</p>
<ul style="list-style-type: none"> <li>Immediately after chapter project chairs are appointed by the chapter president, report the name(s) of the project chairs for the P.E.O. Educational Loan Fund, P.E.O. International Peace Scholarship Fund, P.E.O. Program for Continuing Education, P.E.O. Scholar Awards, P.E.O. STAR Scholarship and Cottey College.</li> <li>Log in to the P.E.O. website, on the P.E.O. Hub&gt;My Chapter&gt;Officers&gt;Project Chairs.</li> </ul>	<p><b>Local Chapter Report of Project Chair</b></p>
<ul style="list-style-type: none"> <li>In a year when the chapter is eligible for a delegate to Convention of International Chapter, make the appropriate online entries on the P.E.O. Hub to report the names of nominees for delegate and alternate.</li> <li>The local chapter nominates the delegate and alternate to Convention of International Chapter. They are elected at the convention of s/p/d chapter. Delegate and alternate for an eligible chapter in non-chartered territory are elected by their local chapter.</li> </ul>	<p><b>Nominee for Delegate to Convention of International Chapter</b> (odd-numbered years for eligible chapters)</p>

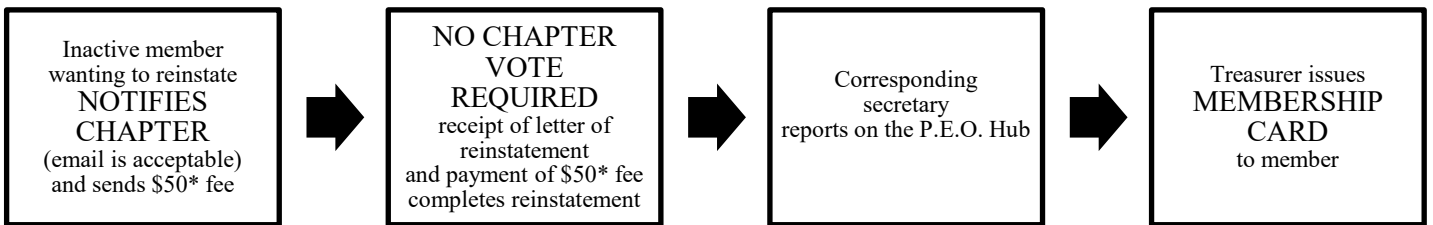
<p><b>ANNUAL REPORTS</b></p>	
<ul style="list-style-type: none"> <li>The Membership Roster, Local Chapter Dues Form and Annual Summary of Treasurer of Local Chapters (IRS-LC) (for U.S. chapters) collectively comprise the annual report. Unless specified, use of the term annual report will incorporate all three forms.</li> </ul>	<p><b>Definition</b></p>
<ul style="list-style-type: none"> <li>Each year, between January 1 and February 24, review and update the Membership Roster as required by International Chapter.</li> <li>Correct any discrepancies and complete any missing information on the Membership Roster on the P.E.O. Hub.               <ul style="list-style-type: none"> <li>On or before the review deadline, report to chapter president that the review is complete, any necessary updates have been made and the records are correct.</li> <li>NOTE: This review is in <b>advance</b> of the electronic submittal of annual report in March. With the corresponding secretary's review, her annual report duties are complete and she does not need to submit an electronic report.</li> </ul> </li> <li>After the treasurer completes her portion of the annual report between March 1 and March 10, the president will verify that the corresponding secretary has reviewed and made any necessary corrections to the Membership Roster.</li> <li>Members who have been inactive more than 10 years will no longer appear on the chapter's Membership Roster on the P.E.O. Hub unless the date is adjusted to include member records more than 10 years old.</li> </ul>	<p><b>Membership Roster</b></p>
<ul style="list-style-type: none"> <li>When notice of release is received, read the release to the chapter with the next monthly report. The release is filed by the president.</li> <li>Once notice of release is received, books and supplies may be transferred to the new corresponding secretary, if applicable.</li> </ul>	<p><b>Upon Receipt of Release</b></p>

# TRANSFER AND REINSTATEMENT PROCESSES FLOWCHARTS

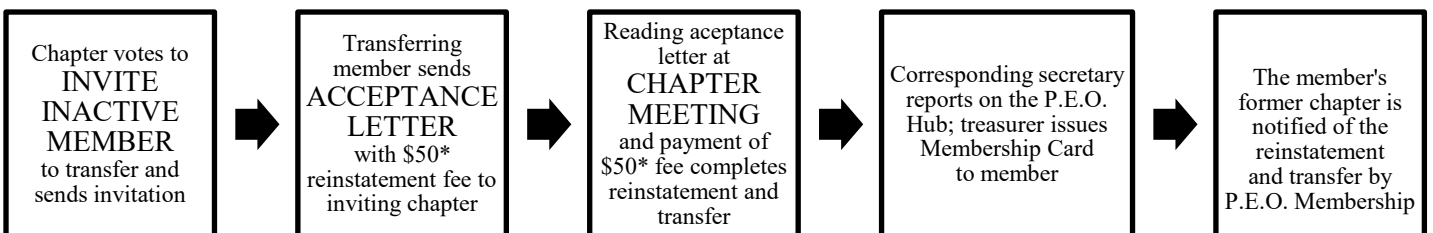
## TRANSFER PROCESS



## REINSTATEMENT PROCESS FOR INACTIVE MEMBER



## REINSTATEMENT PROCESS FOR INACTIVE MEMBER TRANSFERRING TO NEW CHAPTER



\*Reinstatement fee: \$35 before March 1, 2026 or \$50 on or after that date.

# INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) TREASURER

Instructions may be downloaded from the P.E.O. Hub, which can be accessed  
by logging into the International website at <https://peointernational.org>.

## RETENTION RECORD

TYPE OF RECORD	RETENTION (hard copy/electronic)
<b>Retain or destroy material in accordance with this record.</b>	
Annual Summary of Treasurer, Form IRS-LC (U.S chapters only)	Six years
Banking records, including monthly statements	Six years
Chapter IRS identification number (U.S. chapters only)	Life of chapter
Financial ledger spreadsheets	Six years following last entry
Monthly treasurer reports	Retained in recording secretary's files until Audit Committee report is accepted by chapter
Receipt Book duplicates	One year
Roll Call Pages	Two years: the current and the previous year

<b>GENERAL INFORMATION</b>	
<ul style="list-style-type: none"> <li>• Study Part III of the Constitution, bylaws and standing rules of local, state/provincial/district (s/p/d) and International chapters.</li> </ul>	<b>Constitution, Bylaws &amp; Standing Rules</b>
<ul style="list-style-type: none"> <li>• Deliver to successor all books, papers and supplies at the expiration of term of office and train successor on the duties and responsibilities of the office.</li> <li>• Update signature(s) on chapter bank account(s) for current president and treasurer. If a signatory other than the president or treasurer is necessary, that member must be voted on by the chapter and noted in the minutes.</li> </ul>	<b>Officer Transition</b>
<ul style="list-style-type: none"> <li>• Receive and disburse funds of the chapter. Give receipts for all cash received or upon request. Enter all transactions in the accounting records.</li> <li>• Deposit all money from dues, gifts, fundraisers, ways and means, etc., into a chapter bank account.</li> <li>• The first receipt issued on or after March 1 shall be No. 1.</li> <li>• All disbursements of a local chapter are to be approved by chapter vote prior to payment. Budgeted items require approval by chapter vote before payment is made.</li> <li>• Chapter Meeting – Call the roll at each meeting.</li> </ul>	<b>Treasurer's Duties</b>
<ul style="list-style-type: none"> <li>• At the chapter's discretion, the Ceremony of Initiation may be read from the P.E.O. Ceremony of Initiation booklets provided by International Chapter. If the official booklets are used, each participant is required to hold her booklet during the Ceremony of Initiation. An exception may be made for the president who memorizes.</li> </ul>	<b>Ceremony of Initiation</b>
<ul style="list-style-type: none"> <li>• Report to the chapter at the first meeting of each month using Treasurer's Monthly Report to Chapter form. The report is dated the first day of the month. <ul style="list-style-type: none"> <li>○ A consolidated report may be given at the first meeting following a vacation period or meeting(s) missed due to lack of quorum.</li> <li>○ The report is filed with the recording secretary and only the summary is recorded in the minutes.</li> <li>○ The report is kept for the Audit Committee.</li> </ul> </li> <li>• Present all bills. <ul style="list-style-type: none"> <li>○ Members shall submit bills to the treasurer before the meeting begins.</li> </ul> </li> </ul>	<b>Reports Given at Chapter Meetings</b>
<ul style="list-style-type: none"> <li>• Credit cards are not to be issued or held using the name or tax ID number of a local chapter. Credit cards that are automatically issued in conjunction with a bank account should be destroyed and not used.</li> <li>• The treasurer shall pay all bills of the chapter by check, debit card or electronic payment. The chapter must give prior approval before a check is written, a debit card is used or electronic payment initiated.</li> </ul>	<b>Local Chapter Credit/Debit Cards</b>

<ul style="list-style-type: none"> <li>• Chapters may choose to receive funds by debit/credit card reader (Square, Roampay, Payanywhere, etc.) and/or P2P mobile app service (Venmo, Zelle, Square Cash, etc.) to accept payments for:             <ul style="list-style-type: none"> <li>○ Dues, Initiation and Reinstatement Fees</li> <li>○ Fundraisers, including Bed and Breakfast (B&amp;B) program payments</li> <li>○ Non-tax-deductible donations to chapters (for tax deductible donations, refer to the Treasurer section <a href="#">Contributions to P.E.O. Projects</a>)</li> </ul> </li> <li>• The debit/credit card reader and/or P2P service must be linked directly to the chapter’s bank account. Chapters may not use card readers or P2P services linked to a member’s bank account. At the chapter’s discretion, transaction fees associated with this service may be paid from chapter funds or, if allowed by state, provincial or district law, added to the charges processed for the cardholder. Use of a debit/credit card reader and/or P2P service must be approved by chapter vote.</li> </ul>	<p><b>Receiving Payments by Debit/Credit Card Reader and/or Peer-to-Peer Mobile Apps</b></p>
<ul style="list-style-type: none"> <li>• Immediately remit chapter contributions to P.E.O. projects to the treasurer (or paid assistant) of the s/p/d chapter or, if in non-chartered territory, to the Director of Finance/Treasurer of International Chapter.</li> <li>• If a chapter wishes to participate in any of the International Chapter project recognition programs, those donations are to be received by the treasurer (or paid assistant) of the s/p/d no later than January 31 in order for the chapter to be recognized at the spring s/p/d convention.</li> <li>• Immediately forward to the Director of Finance/Treasurer of International Chapter contributions to qualified International Chapter P.E.O. projects received from individuals (members and nonmembers), with the exception of Cottey College. Contributions for Cottey College should be forwarded directly to the college.             <ul style="list-style-type: none"> <li>○ Do not record contributions from individuals in the accounting records. These contributions are tax-deductible if conveyances (checks, money orders, etc.) are:                 <ul style="list-style-type: none"> <li>▪ made payable to the qualified project; and</li> <li>▪ forwarded without endorsement or deposit.</li> </ul> </li> </ul> </li> </ul>	<p><b>Contributions to P.E.O. Projects</b></p>
<ul style="list-style-type: none"> <li>• Contributions by individuals should be made payable to the P.E.O. Foundation and sent to the Director of Finance/Treasurer of International Chapter.</li> <li>• Do not deposit P.E.O. Foundation contributions by individuals or record them in the accounting records. The contributions are deductible for U.S. federal income, state and gift tax purposes only if conveyances (checks, money orders, etc.) are made payable to the P.E.O. Foundation.</li> </ul>	<p><b>Individual Contributions to P.E.O. Foundation</b></p>
<ul style="list-style-type: none"> <li>• Chapter contributions to the P.E.O. Foundation should be made payable to the s/p/d chapter and immediately sent to the treasurer (or paid assistant) of the s/p/d chapter or, if in non-chartered territory, to the Director of Finance/Treasurer of International Chapter.</li> </ul>	<p><b>Chapter Contributions to P.E.O. Foundation</b></p>
<ul style="list-style-type: none"> <li>• Chapters that have bank accounts must use financial institutions located and licensed in the United States and/or Canada.</li> </ul>	<p><b>Bank Account Guidelines</b></p>

<ul style="list-style-type: none"> <li>• Supplies may be ordered by the following methods:             <ul style="list-style-type: none"> <li>○ Local Chapter Supply Order form: Send with correct remittance to P.E.O. Supply Department, 3700 Grand Avenue, Des Moines, IA 50312. Form may be downloaded from the P.E.O. Hub.</li> <li>○ Personal credit card orders may be submitted through the P.E.O. Hub.</li> </ul> </li> <li>• Keep on hand the required supplies for office as shown on List of Supplies for Officers of Local Chapters. Forms available on the P.E.O. Hub may be downloaded when needed.</li> <li>• Order a Constitution from the P.E.O. Supply Department to give to the new initiate under Suggestions for the Good of the Chapter on the date of her initiation. At the discretion of the chapter, an initiate may receive the Constitution electronically through access to the P.E.O. Hub in lieu of providing a hard copy.</li> </ul>	<p><b>Supplies</b></p>
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<p><b>EMBLEMS</b></p>	
<ul style="list-style-type: none"> <li>• The P.E.O. Emblem Division receives emblem orders, related correspondence and returned emblems.</li> <li>• Use the Official Emblem Order Form for ordering all emblems and send with correct remittance to the P.E.O. Emblem Division. Emblems may be ordered online with a debit card or personal credit card payment. The treasurer will order and deliver emblems for initiates and for others upon request. (Constitution, Part III, ARTICLE V, Sec. 6)</li> <li>• The name listed for engraving must agree with the name of the member as submitted by the Corresponding Secretary.</li> <li>• Emblem for a member cannot be ordered until after her initiation.</li> <li>• Two clasp options for the P.E.O. emblem are available. One style has the traditional safety latch; the second style has a button-back clasp. Purchase price is the same for both styles. Determine which style the member prefers before ordering.</li> <li>• Confer with the corresponding secretary to verify the initiation has been reported.</li> <li>• Emblem order, Member ID # and The P.E.O. Record subscription will be processed after the initiation is reported.</li> </ul>	<p><b>Emblem Orders for New Member</b></p>
<ul style="list-style-type: none"> <li>• Use the Official Emblem Order Form entering the reinstatement date on the form.             <ul style="list-style-type: none"> <li>○ The reinstating chapter orders the emblem, if needed, using funds from the reinstatement fee.</li> </ul> </li> </ul>	<p><b>Emblem Order for Reinstating Member</b></p>

<b>ANNUAL DUES</b>	
<ul style="list-style-type: none"> <li>• At least six weeks prior to March 1, notify all active members that dues are payable. This includes notice to any members whose transfers out have not yet been completed by the receiving chapter. Send second notice if necessary.</li> <li>• Prior to March 1, determine potential need by member(s) for assistance with dues.</li> <li>• Collect annual dues from the members. Members will pay their dues in either U.S. or Canadian dollars.</li> <li>• Membership Cards are issued and serve as receipts when dues are paid. Membership Cards are available from the Supply Department or fill/print from the P.E.O. Hub.</li> <li>• Issue Membership Card to each member who has paid dues for the upcoming year (March 1–February 28/29).</li> <li>• Issue Membership Card to members who reinstate during the year.</li> <li>• Twenty-five dollars (\$15 dollars before March 1, 2026) of the initiation or reinstatement fee shall be held, then forwarded, with the annual dues and in addition to them. (Constitution, Part III, ARTICLE VIII, Sec. 1; ARTICLE IX, Sec. 1)</li> <li>• A member remains an active member of her current chapter until another chapter has accepted her transfer. If inviting chapter does not accept a transfer before February 1, the current chapter must collect dues from the member.</li> </ul>	<p><b>Notice/Collection of Dues</b></p>
<ul style="list-style-type: none"> <li>• The following procedure may be used to advance the dues for a member whose dues have not been received before March 1: <ul style="list-style-type: none"> <li>○ At the last meeting of the chapter in February, the treasurer announces the name of any member whose dues have not been received. By vote of the chapter, the treasurer may be authorized to advance s/p/d and International dues. (Payment of these dues maintains the member’s active status.)</li> <li>○ The treasurer remits dues to the s/p/d treasurer for all paid members and those whose dues were voted on to be advanced. A notation should be made in the description section of the checking spreadsheet that dues were advanced for members. No other entry is made on the spreadsheet other than the amount of the dues paid.</li> <li>○ If the dues are received the next month, the treasurer makes a deposit and enters the transaction like any other dues deposit. A notation should be made in the description section that dues were reimbursed by members. No other entry is made on the spreadsheet.</li> </ul> </li> </ul> <p>Note: Dues collected (receipts) will not equal dues paid (disbursements) when dues have been advanced during the year.</p> <ul style="list-style-type: none"> <li>○ In using this process, the chapter maintains the integrity of the accounting records, recording only what was actually received and disbursed each year.</li> </ul>	<p><b>Dues Advancement for Treasurer’s Record Book Entry</b></p>
<ul style="list-style-type: none"> <li>• Send s/p/d and International chapter dues to the treasurer (or paid assistant) of the s/p/d chapter or, if in non-chartered territory, to the Director of Finance/Treasurer of International Chapter. (Constitution, Part I, ARTICLE VIII, Sec. 1; Part III, ARTICLE VIII, Sec. 1 and 2; ARTICLE IX, Sec. 1)</li> </ul>	<p><b>Payment to International and S/P/D Chapter</b></p>

<ul style="list-style-type: none"> <li>For chapters in the United States, record chapter IRS identification number and keep in the Local Chapter Treasurer’s Financial Records and Roll Call Book.</li> </ul>	<b>IRS Identification Number</b>
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<b>ANNUAL REPORT</b>	
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<ul style="list-style-type: none"> <li>The Membership Roster, Local Chapter Dues Form and Annual Summary of Treasurer of Local Chapters (IRS-LC) (for U.S. chapters) collectively comprise the annual report. Unless specified, use of the term annual report will incorporate all three forms.</li> </ul>	<b>Definition</b>
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<ul style="list-style-type: none"> <li>Access to the annual report will be granted on March 1 through the P.E.O. Hub.</li> </ul>	<b>Access</b>
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<ul style="list-style-type: none"> <li>When notice of release is received:             <ul style="list-style-type: none"> <li>Provide the Local Chapter Dues form to the Audit Committee.</li> <li>Books and supplies may be transferred to the new local chapter treasurer, if applicable.</li> </ul> </li> </ul>	<b>Release and Transition</b>
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## **ROLL CALL**

### **PROCEDURE FOR PREPARING THE ROLL CALL**

1. A new roll is made as of March 1 each year.
2. List the names of active members in alphabetical order.
3. Leave space for adding names of initiates or members received by transfer or reinstatement of membership.
4. At the chapter's discretion, members unable to regularly attend meetings may be listed at the end of the roll call or may be placed on a list separate from the regular roll call.

### **ROLL CALL**

1. When attending in-person, remain seated when the president states that the treasurer will call the roll. Stand after roll is called, address the chair and announce the number present.
2. Immediately following the report of attendance, continue with the remaining reports: the monthly financial report (if the first meeting of the month) and the presentation of bills.
3. The roll is called (including the treasurer's name) at each regular and special meeting. Members respond by saying "present."
4. If a separate roll call list is used for members unable to regularly attend meetings, names of those members are called only when present.
5. As a best practice, as the roll is called, mark 1, 2, 3, etc. in pencil so the report may be given promptly.
6. Add numbers in sequence for members arriving during the meeting after the number present has been announced.

### **RECORD DECREASES IN MEMBERSHIP**

Record the date of decrease in membership by death, transfer or expulsion on the line with the member's name.

### **SPECIAL LIST FOR MEMBERS INDEBTED TO THE CHAPTER**

1. Prepare a special list for members not entitled to vote due to indebtedness.
2. Record date and amount of indebtedness. Record date when canceled.

### **RETENTION OF ROLL CALL RECORDS**

Keep for two years (the current and the previous year).

### **REFILLS**

Order refill pages from the P.E.O. Supply Department or downloaded from the P.E.O. Hub.

# INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) CHAPLAIN

**Instructions may be downloaded from the P.E.O. Hub, which can be accessed by logging into the International website at <https://peointernational.org>.**

<b>GENERAL INFORMATION</b>	
<ul style="list-style-type: none"> <li>• Study Part III of the Constitution, bylaws and standing rules of local, state/provincial/district (s/p/d) and International chapters.</li> </ul>	<b>Constitution, Bylaws &amp; Standing Rules</b>
<ul style="list-style-type: none"> <li>• Keep on hand at all times the required supplies for office as shown on List of Supplies for Officers of Local Chapters.</li> </ul>	<b>Supplies of Office</b>
<ul style="list-style-type: none"> <li>• Deliver all books, papers and supplies to successor at the expiration of term of office and train successor on the duties and responsibilities of the office.</li> </ul>	<b>Officer Transition</b>
<ul style="list-style-type: none"> <li>• At the chapter’s discretion, the Ceremony of Initiation may be read from the P.E.O. Ceremony of Initiation booklets provided by International Chapter. If the official booklets are used, each participant is required to hold her booklet during the Ceremony of Initiation. An exception may be made for the president who memorizes. The Chaplain’s Prayer for initiation is included in the official booklets. If the official booklets are not used, the chaplain may read the prayer from the official printed card. (Constitution, Part III, ARTICLE VI, Sec. 10)</li> </ul>	<b>Ceremony of Initiation</b>
<ul style="list-style-type: none"> <li>• It is not necessary for the chaplain to address the chair before conducting the devotions.</li> <li>• Conduct the devotions of each meeting following instructions in the President’s Book. Devotions are limited to a reading from the Bible or other inspirational text which is acceptable to the chapter. Any version of the Bible which is acceptable to the chapter may be used; the P.E.O. prayer may be read by the chaplain or the recorded version may be used. If the chapter chooses to recite the Lord’s Prayer, they may recite it in unison or use a pre-recorded version.</li> </ul>	<b>Devotions</b>

# INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) GUARD

Instructions may be downloaded from the P.E.O. Hub, which can be accessed by logging into the International website at <https://peointernational.org>.

<b>GENERAL INFORMATION</b>	
<ul style="list-style-type: none"><li>Study Part III of the Constitution, bylaws and standing rules of local, state/provincial/district (s/p/d) and International chapters.</li></ul>	<b>Constitution, Bylaws &amp; Standing Rules</b>
<ul style="list-style-type: none"><li>Keep on hand at all times the required supplies for office as shown on List of Supplies for Officers of Local Chapters.</li></ul>	<b>Supplies of Office</b>
<ul style="list-style-type: none"><li>Deliver all books, papers and supplies to successor at the expiration of term of office and train successor on the duties and responsibilities of the office.</li></ul>	<b>Officer Transition</b>
<ul style="list-style-type: none"><li>At the chapter's discretion, the Ceremony of Initiation may be read from the P.E.O. Ceremony of Initiation booklets provided by International Chapter. If the official booklets are used, each participant is required to hold her booklet during the Ceremony of Initiation. An exception may be made for the president who memorizes.</li></ul>	<b>Ceremony of Initiation</b>
<ul style="list-style-type: none"><li>The password is not taken at any meeting. The guard shall confirm the membership of all who join the meeting in accordance with the President's Book. Any unknown unaffiliate will show her current membership card or, if attending by telephone, notify the chapter of her chapter letters and location (city and s/p/d).</li></ul>	<b>Chapter Meeting Responsibilities</b>

## GUARD'S INSTRUCTIONS FOR INITIATION

1. The Ceremony of Initiation may only be exemplified or conferred when all initiating participants, the prompter and the candidate(s) are attending either all in person or all virtually.
2. In the local chapter, the initiatory emblem shall be used ONLY for initiation.
3. If a cloth is used on table, it must be all white and in place at opening of meeting. It may be removed by guard after ceremony.

### In-Person Ceremony

4. Guard does not leave her area until assistant guard takes her place. Area is never left unattended during initiation and no one is admitted during the Ceremony of Initiation.
5. For initiation, remove chairs and clear table. If necessary, move table to prearranged location. Place President's Book in a convenient place to return to the table for initiate(s) to sign during ceremony.
6. Refer to diagram in the P.E.O. Ceremony of Initiation booklet for arrangement of articles on initiatory table.
  - a. Bring in initiatory emblem in easy, natural manner, with letters facing guard. Be sure ribbons are secured under emblem. Rings may be looped over points of emblem prior to bringing it to the table.
  - b. Place emblem in center of table with letters facing president's place at table. Proceed around table (in either direction) to loosen ribbons under emblem points. Place rings at emblem points and extend tassels outward in a straight line. Do not reach across emblem at any time.
  - c. Bring in P.E.O. pin(s) and closed Bible. Refer to appropriate diagram in Prompter's Booklet for Initiation. Place pin(s) in proper position; place Bible on table; open Bible.
  - d. Bring in white gavel (if used), or secure gavel used by president. Place at left of Bible.
  - e. Take place in circle as indicated on diagram for initiatory table. President takes her place and signals to other officers.
7. Wait for instruction from president before leaving place in circle to conduct the candidate(s) to the table.
8. If a member has been with the candidate(s) prior to initiation, confirm her membership before conducting candidate(s) to meeting room.
9. Conduct candidate(s) to her (their) place(s) in the circle.
10. Guard takes her place in the circle and assists candidate(s) as needed during ceremony.
11. Place President's Book at right of Bible for initiate to sign. Book may rest on ribbon but must not touch Bible.

12. After initiate(s) sign(s), remove President's Book. Step back in circle and hold book until end of ceremony.
13. Immediately after ceremony:
  - a. Remove emblem by folding ribbons once over top of emblem; place one hand under emblem and fingers of other hand on top to prevent ribbons from slipping.
  - b. Return to table and remove Bible and gavel. If another ceremony follows, refold the ribbons under the emblem and repeat from #6.
  - c. Arrange table for president and recording secretary to resume places and meeting. Cloth may be removed, if desired.

#### Virtual Ceremony

1. Refer to diagram in the P.E.O. Ceremony of Initiation Prompter's Part for arrangement of articles on initiatory table.
2. In a virtual ceremony, the guard positions the webcam so that the initiatory emblem, gavel, Bible and emblem are visible. Only one emblem is placed on the table for a virtual ceremony, regardless of the number of candidates.
3. As each participant speaks to a specific virtue, the guard displays the virtue printed on the ribbon so that it is seen on the video screen until after the participant responds to the chaplain's statement. Each ribbon, in turn, is laid upon the table with the tassel draped over the edge to hold it taut while the guard moves to draw the next ribbon.
4. After the initiation prayer, and as the president continues with the ceremony, the guard circles the table, folding the ribbons once and placing rings at points of initiatory emblem, with tassels lying on ribbons.
5. The guard stops transmitting live feed of initiatory emblem at the conclusion of the Ceremony of Initiation.

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

**Instructions may be downloaded from the P.E.O. Hub, which can be accessed by logging into the International website at <https://peointernational.org>.**

<b>KEY GUIDELINES</b>	
<ul style="list-style-type: none"> <li>A local chapter shall use the Procedure for P.E.O. Chapter Meeting, Opening Ode, Objects and Aims, Ceremony of Initiation and Ceremony of Installation as they appear in the President’s Book. (Constitution, Part I, ARTICLE IV, Sec. 5)</li> </ul>	<b>Statement of Policy</b>
<ul style="list-style-type: none"> <li>The P.E.O. Sisterhood, or any division thereof, shall not affiliate with any other organization. (Constitution, Standing Rule #1)</li> <li>Reciprocities, P.E.O. Groups, state/provincial/district (s/p/d) chapters and local chapters shall not establish a P.E.O. fund within a college educational foundation or community foundation.</li> <li>Local chapters are not to join a Chamber of Commerce or similar organizations. Individual membership to a Chamber of Commerce or similar organization shall be in the member’s name and not as a representative of P.E.O.</li> </ul>	<b>Affiliations</b>
<ul style="list-style-type: none"> <li>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 that are contrary to the Constitution or their respective bylaws and standing rules.</li> <li>When an item that must be implemented by the local chapter has been adopted at Convention of International Chapter or s/p/d chapter, all local chapters must edit their bylaws and standing rules accordingly and send a copy as instructed by the s/p/d executive board.</li> <li>The year following Convention of International Chapter, the Constitution and all revisions relating to the local chapter shall be sent directly to the local chapter president.</li> </ul>	<b>Constitution, Bylaws &amp; Standing Rules</b>
<ul style="list-style-type: none"> <li>In the absence of specific P.E.O. guidance, “Robert’s Rules of Order” is the formally adopted parliamentary authority. As it pertains to proposed amendments to P.E.O. documents, guidance from “Robert’s Rules of Order” states 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.</li> <li>Absentee or proxy ballots are not allowed for local chapter business. A member must attend the meeting in order to participate in debate or vote. Email voting between meetings is not allowed.</li> </ul>	<b>Parliamentary Authority</b>

<ul style="list-style-type: none"> <li>• 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"> <li>○ Constitution: Introduction, Part I, Part II and Part III</li> <li>○ Bylaws and Standing Rules of International Chapter</li> <li>○ Procedure for P.E.O. Chapter Meeting (which includes the Opening Ode, Objects and Aims, Ceremony of Initiation and Ceremony of Installation)</li> </ul> </li> </ul> <p>Note: The portions of the Procedure for P.E.O. Chapter Meeting, Ceremony of Initiation and Ceremony of Installation in italics are instructions from the Executive Board of International Chapter and are not amendable.</p> <ul style="list-style-type: none"> <li>• The Manual for the Amendments and Recommendations Committee is available on the P.E.O. Hub. The procedure to propose resolutions to be considered at a Convention of International Chapter is described in this manual.</li> </ul>	<p><b>Proposed Amendments to the Constitution, Bylaws and Standing Rules, and Procedures for P.E.O. Chapter Meeting</b></p>
<ul style="list-style-type: none"> <li>• For chapters in the U.S., <b>Internal Revenue Service Identification Numbers</b> 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"> <li>○ IRS identification numbers are typically assigned within 4-6 weeks following a chapter organization meeting.</li> <li>○ 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. <b>Do not contact the IRS.</b></li> </ul> </li> <li>• <b>IRS Classification</b> <ul style="list-style-type: none"> <li>○ No local chapter shall be allowed to obtain an IRS 501(c)(3) charitable classification for local chapter funds.</li> </ul> </li> </ul>	<p><b>IRS Identification Numbers &amp; Classification</b> (Chapters in U.S. only)</p>
<ul style="list-style-type: none"> <li>• 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.</li> </ul>	<p><b>Lost Charter</b></p>

<ul style="list-style-type: none"> <li>• The name of one to two nearby cities may be used to designate a chapter. If two cities are used to designate a chapter, the cities shall be hyphenated. A descriptive name for an area is not used.</li> <li>• 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 (<math>\frac{2}{3}</math>) 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 <a href="#">Exhibit A</a> – Procedure for Securing Change in Location of a Local Chapter of the P.E.O. Sisterhood.             <ul style="list-style-type: none"> <li>○ 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 <a href="#">Exhibit B</a> – Petition of Local Chapter for Change in Location of Chapter Designation.</li> <li>○ The treasurer of the local chapter shall forward payment of the \$15 fee to the executive director. Follow instructions in <a href="#">Exhibit A</a>, Procedure for Securing Change in Location of a Local Chapter of the P.E.O. Sisterhood.</li> </ul> </li> </ul>	<p><b>Change in Chapter's City Designation</b></p>
<ul style="list-style-type: none"> <li>• At the time of local chapter treasurer's annual reports, each chapter shall pay \$50 to cover the cost for International Chapter to provide technology, materials and supplies to each local chapter. In a given year, the amount of \$50 may or may not cover the actual cost, however, it is the intent that it will be an average.</li> </ul>	<p><b>Supply/Resource/Technology Payment</b></p>
<ul style="list-style-type: none"> <li>• 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.</li> </ul>	<p><b>Yearbooks</b></p>
<ul style="list-style-type: none"> <li>• Chapter meetings, as listed in the yearbooks, that are canceled for reasons of emergency (e.g., inclement weather) are not rescheduled.</li> <li>• Chapter meetings, as listed in the yearbooks, that are canceled because of lack of quorum are not rescheduled.</li> </ul>	<p><b>Canceled Meetings</b></p>
<p>Digital chapters allow more options for organizing chapters, thereby expanding P.E.O.'s world presence. A digital chapter is different from a chapter that meets using a virtual format in that digital chapters are subject to the following additional governance criteria:</p> <ul style="list-style-type: none"> <li>• To organize as a digital chapter, a majority of charter members must have residency spread across multiple s/p/ds and/or the majority of charter members must have primary addresses in non-chartered territory (other than Hawaii).</li> <li>• The organization of digital chapters is at the discretion of and under the supervision of the organizer of International Chapter.</li> <li>• Organizations and Official Visits for digital chapters will be conducted using a virtual format.</li> </ul>	<p><b>Digital Chapters</b></p>
<p>All legal and/or tax matters involving the local chapter shall be reported immediately to the president of International Chapter. She shall counsel and advise on further procedure. Any local chapter matter that requires legal and/or tax services shall be handled by International Chapter. The costs of such services shall be prorated between International Chapter and the local chapter requiring the services as directed by the Executive Board of International Chapter. Reimbursement to International Chapter for such services shall be made in U.S. dollars.</p>	<p><b>Legal and Tax Matters</b></p>

<b>LEGAL ENTITIES</b>	
<ul style="list-style-type: none"><li>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.</li></ul>	<b>Incorporation or Formation of Other Legal Entities</b>
<ul style="list-style-type: none"><li>Should a local chapter be the recipient of real property, title to such property may be held by the P.E.O. Foundation.</li></ul>	<b>Real Property</b>

<b>MISCELLANEOUS</b>	
<ul style="list-style-type: none"> <li>• Observance of Founders' Day/International P.E.O. Day shall be done in accordance with s/p/d bylaws and standing rules.</li> </ul>	<b>Founders' Day/ International P.E.O. Day</b>
<ul style="list-style-type: none"> <li>• The storage of local chapter minutes, yearbooks, directories and/or historical memorabilia with private/personal identifying information of members or project applicants/recipients may not be housed in a facility (e.g., library, museum, college archives, historical society, etc.) that would allow access to the materials by the public (anyone other than P.E.O. members).</li> <li>• General historical memorabilia not containing private/personal identifying information may be housed in a facility that would allow access to the materials by the public.</li> <li>• Minutes older than 10 years may be archived other than in their original format. If a digital media format for storage is chosen, the chapter is responsible to maintain the archived minutes on current technology.</li> <li>• For more information, refer to P.E.O. Historical Collections Guidelines for Local Chapters on the P.E.O. Hub.</li> </ul>	<b>Archival Storage for Minutes and/or Historic Memorabilia</b>
<ul style="list-style-type: none"> <li>• 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.</li> <li>• 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.</li> </ul>	<b>Disaster Relief Funds</b>
<ul style="list-style-type: none"> <li>• 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.</li> <li>• 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.</li> </ul>	<b>Losses Due to Natural Disaster</b>

<ul style="list-style-type: none"> <li>• 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 whom to serve and, more importantly, whom not to serve.</li> <li>• If an event is held in a member’s home where alcohol will be served, 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.</li> <li>• 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 s/p/d laws pertaining to a liquor license requirement.</li> <li>• 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.</li> </ul>	<p><b>Alcohol Policy</b></p>
<ul style="list-style-type: none"> <li>• P.E.O. does not carry automobile insurance to cover vehicles rented by any members other than the Executive Board of International Chapter.</li> <li>• 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.</li> <li>• It is strongly advised that members traveling for P.E.O.-related business NOT rent a vehicle unless purely for personal use.</li> </ul>	<p><b>Car/Vehicle Rental</b></p>
<ul style="list-style-type: none"> <li>• News release templates are available on the P.E.O. Hub for local chapters for the following purposes: <ul style="list-style-type: none"> <li>○ Promote upcoming public events and fundraisers. Local chapters should consult the Media Guide available on the P.E.O. Hub for assistance in style; and</li> <li>○ 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. This form is available on the P.E.O. Hub.</li> </ul> </li> </ul>	<p><b>Publicity Policy</b></p>

<ul style="list-style-type: none"> <li>• 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.</li> <li>• 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.</li> <li>• 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.</li> <li>• Other star designs and informal stylized logo may be used at the chapter’s discretion.</li> </ul>	<p><b>Use of P.E.O. Insignia</b></p>
<ul style="list-style-type: none"> <li>• For an in-person Ceremony of Initiation, no photos or videos may be taken of the initiatory emblem. For a hybrid or virtual Ceremony of Initiation, there shall be no photos, recordings or screenshots taken of the initiatory emblem. Photos of the initiate(s) and members are allowed after the meeting is adjourned.</li> </ul>	<p><b>Initiatory Emblem</b></p>
<ul style="list-style-type: none"> <li>• 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)</li> </ul>	<p><b>P.E.O. Quotations</b></p>
<ul style="list-style-type: none"> <li>• P.E.O. informational materials prepared by local chapters shall not be advertised for sale in the Fundraising Marketplace. 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.</li> </ul>	<p><b>P.E.O. Informational Materials</b></p>
<ul style="list-style-type: none"> <li>• Local chapter publicity (press releases, websites and social media posts) pertaining to project recipients (including International and s/p/d projects and local chapter scholarships):</li> </ul> <p>No personal, identifying information for project recipients can be shared on news media, P.E.O. websites or social media accounts without a completed P.E.O. Photograph and Publicity Consent Form. This form is available on the P.E.O. Hub or the International website.</p>	<p><b>Local Chapter Publicity Pertaining to Project Recipients</b></p>

1. The primary purpose of a P.E.O. website for a 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. Hub for P.E.O. 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 contact information 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 website and P.E.O. Hub 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 Cotley College website.
9. Keep 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 informal logo with the yellow and maroon daisy, a rendering of the emblem, stylized stars or marguerites may be used.
11. CAUTION – It is important to contact and provide information for all members who do not have email or 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.

### 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 intent 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 private, 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 and Pinterest 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, s/p/d chapters as well as groups created for the purpose of connecting P.E.O.s are required to adhere to the following:
- Naming structure
  - For local chapter groups – P.E.O. Chapter A, Daisytown, Iowa
  - For s/p/d groups – P.E.O. Iowa State Chapter
  - For outside/nonchapter groups – P.E.O. (insert name of group)
- Groups and conversations must uphold the P.E.O. brand, voice and the Objects and Aims.
- Groups, except for a local chapter group, must notify International Chapter of the group by emailing [mediamanager@peodsm.org](mailto:mediamanager@peodsm.org) with the name of the group and administrator(s).
- Group administrators are responsible for monitoring discussion and removing content that does not uphold P.E.O. values. Groups that do not monitor discussion and remove content that does not uphold P.E.O. values may be required to close or remove P.E.O. from their name as directed by International Chapter.
- If the group is set up as a “Private Group,” administrators must verify P.E.O. membership prior to granting access.
- 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. values and our Objects and Aims.
- The discussions on social media are meant to stimulate conversation not to create contention. Let others have their say, just as you may.
- Group posts should not contain commercial messages, promotional material, special offers, non-P.E.O.-related job offers, product announcements or solicitation for services.
- Refer to Policies section of IOLC [Promotion of Fundraisers on Social Media](#) for information on how to use social media for chapter fundraisers.
- 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.
- 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.
- Be cognizant that the appearance of your “Facebook Timeline” or social media front page portrays an image of P.E.O. to everyone – members and nonmembers.
- International Chapter has official social media profiles on Facebook, Instagram and LinkedIn. 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: linkedin.com/company/peo-international

<b>EMAIL COMMUNICATION AND CIRCULARIZATION</b>	
<ul style="list-style-type: none"> <li>When sending email to a large group, consider using the blind carbon copy (BCC) function to protect recipients' privacy. Using the BCC prevents reply-all chains and safeguards personal email addresses.</li> </ul>	<b>Email Communication</b>
<ul style="list-style-type: none"> <li>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.</li> <li>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.</li> <li>Examples of social correspondence that are not circularization requiring authorization:               <ul style="list-style-type: none"> <li>Fundraising correspondence among chapters within an s/p/d. The fundraiser shall be in compliance with the Fundraising Policy. Refer to Policies section of IOLC <a href="#">P.E.O. Fundraising</a>.</li> <li>A luncheon or other social event among chapters within an s/p/d.</li> <li>Social invitations, anniversary celebrations or greetings to local and/or s/p/d chapters in other states, provinces or districts.</li> </ul> </li> </ul>	<b>Definition/Examples</b>
<ul style="list-style-type: none"> <li>Authorization is required when the circularization within the s/p/d pertains to a project of the Sisterhood at large.               <ul style="list-style-type: none"> <li>If the circularization has been approved by a s/p/d convention, the consent of the s/p/d executive board is not required.</li> </ul> </li> <li>An example of circularization that requires the authorization of the executive board of a s/p/d is:               <ul style="list-style-type: none"> <li>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.</li> </ul> </li> <li>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).</li> </ul>	<b>Authorization Required by S/P/D Executive Board</b>
<ul style="list-style-type: none"> <li>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.</li> <li>Any circularized communication should include a statement that authorization has been granted by the Executive Board of International Chapter.</li> </ul>	<b>Authorization Required by International Executive Board</b>

<ul style="list-style-type: none"> <li>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.</li> <li>Members, local chapters or s/p/d chapters shall not circularize other members or local chapters beyond the boundaries of their s/p/d 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 s/p/d.</li> </ul>	<b>Sales of Goods and Services</b>
<ul style="list-style-type: none"> <li>P.E.O. members shall not use P.E.O. membership information for private inurement, which is an IRS concept that prohibits the use of nonprofit information or resources for personal financial gain or other business purposes.</li> </ul>	<b>Private Inurement</b>
<ul style="list-style-type: none"> <li>Members provide P.E.O. with their email addresses with the understanding they will not receive “unsolicited” or mass emails from other members. Please respect their trust in P.E.O. Local presidents and s/p/d chapter officers can be reached via the P.E.O. Hub.</li> <li>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. P.E.O. membership publications and listings (e.g., Leadership listings, Bed and Breakfast [B&amp;B], 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.</li> <li>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.</li> </ul>	<b>Privacy Policy</b>

<b>MEMBERSHIP</b>	
<ul style="list-style-type: none"> <li>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.</li> </ul>	<b>Membership Lists</b>
<ul style="list-style-type: none"> <li>A transfer provides a solution for the member who – for a variety of reasons – is now unable to attend meetings of her chapter. A 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.</li> <li>Chapters should encourage the transfer process when applicable. Use the Seeking a Transfer process on the P.E.O. Hub.</li> </ul>	<b>Seeking a Transfer</b>

<ul style="list-style-type: none"> <li>• The Non-Member Intro (formerly the Introduction of a Woman Who Is Not a P.E.O. form), available on the P.E.O. Hub, 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.</li> <li>• Although the chapter being notified is under no obligation to issue an invitation, they are strongly encouraged to contact this woman.</li> </ul>	<b>Non-Member Intro</b>
<ul style="list-style-type: none"> <li>• Chapters may reaffirm their vows on special occasions, anniversaries or at the time a member is reinstated to active membership. If used to acknowledge a reinstated member, vows are repeated under Suggestions for the Good of the Chapter. (President’s Book, Appendix 14)</li> <li>• The initiatory emblem shall not be used.</li> </ul>	<b>Reaffirmation of Vows</b>
<ul style="list-style-type: none"> <li>• A member who has not paid s/p/d and International dues before March 1 is inactive.</li> <li>• Members who have been inactive more than 10 years will not appear on the Membership Roster unless the date range is adjusted to include member records more than 10 years old.</li> </ul>	<b>Inactive Member</b>

<b>P.E.O. RECIPROCITIES &amp; GROUPS</b>	
<ul style="list-style-type: none"> <li>• 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.</li> </ul>	<b>Dues</b>
<ul style="list-style-type: none"> <li>• 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.</li> <li>• Bank accounts may only be established in financial institutions located and licensed in the United States or Canada.</li> </ul>	<b>Checking/Savings Accounts</b>
<ul style="list-style-type: none"> <li>• 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 <a href="#">P.E.O. Fundraising Policy</a>.</li> <li>• The Internal Revenue Service requires that identification numbers be on file for P.E.O. Reciprocities and Groups maintaining bank accounts (U.S. only).</li> <li>• Identification numbers must be obtained by the P.E.O. Executive Office.</li> </ul>	<b>Tax Exemption</b>

## BED & BREAKFAST

1. If a member of a local chapter volunteers to provide her own home as a P.E.O. Bed and Breakfast (B&B) for other P.E.O. members and their traveling companions, her chapter must vote to sponsor a B&B. The vote may occur at a regular or special meeting.
2. The B&B must be sponsored by a local chapter. It cannot be sponsored by an individual member, P.E.O. group or reciprocity.
3. Local chapters shall not sponsor the P.E.O. B&B service for anyone who conducts a B&B as a personal business for profit.
4. The service is available to active P.E.O. members and their guests traveling with them.
5. B&B guests should be asked to identify themselves with a current P.E.O. membership card.
6. Each local chapter sponsoring a B&B is required to pay an insurance/administrative fee to International Chapter. Please review the P.E.O. International Bed and Breakfast Insurance Coverage carefully. Payment must be received before a chapter's B&B service will be listed on the P.E.O. Hub. Enrollment will be complete once a listing is published on the P.E.O. Hub. Until this date, reservations cannot be accepted.
7. The member listed on the P.E.O. Hub is not required to be the actual hostess for B&B guests; she may be the contact person for the chapter's B&B service. It is her responsibility to make the reservations for the B&B guests with those members of the chapter who have volunteered to be hostesses. Chapters may have several B&B hostesses.
8. The local chapter and B&B hostess may use commercially available receipts should the guest request a receipt.
9. The guest rate per night for the B&B service is determined by the local chapter.
10. To avoid possible conflict with tax liability and s/p/d or local regulations, checks given to the hostess are to be made payable to the local chapter sponsoring the B&B service, **not to the hostess.**
  - a. Neither the guest nor the hostess should expect to claim the amount as a contribution to a qualified P.E.O. project.
  - b. Chapters may choose to receive B&B payments by debit/credit card reader and/or peer-to-peer mobile app services. Refer to [Treasurer's section](#) for details.
11. If the chapter wishes to reimburse the hostess for her expenses, the amount of reimbursement is to be mutually determined. Payment will then be made to the hostess by the local chapter treasurer after a chapter vote for each request for reimbursement.
12. The net income from a local chapter's B&B service must be used exclusively for P.E.O. charities qualified under U.S. Internal Revenue Code Section 501(c)(3), including International Chapter P.E.O. projects, funds held in P.E.O. Foundation and/or other charitable state/district chapter projects. No portion of B&B income may be used for chapter operating expenses.

### Guidelines

13. The local chapter treasurer must report all B&B receipts and disbursements, including an itemized account of the amount given to philanthropies, on Annual Summary of Treasurer of Local Chapters (IRS-LC) (for U.S. chapters).	
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**PROJECT DISPLAYS AT S/P/D CONVENTIONS**

- P.E.O. Educational Loan Fund—Project display can share the number of ELF recipients per local chapter and the total number of loans and total dollar amount awarded in the s/p/d. No names, individual amounts or other identifying information can be shared. Other than a project speaker who has provided a signed P.E.O. Photograph and Publicity Consent Form to the s/p/d, no photos of recipients shall be displayed. See \* below.
- Cottey College—Student information may be displayed, but is limited to home state, province or country, awards received, area of study and campus activities. Other than a project speaker who has provided a signed P.E.O. Photograph and Publicity Consent Form to the s/p/d, no photos of recipients shall be displayed.
- P.E.O. International Peace Scholarship Fund—Project display can share the total number of IPS recipients, the home countries, schools attended and the total dollar amount awarded. No names, individual amounts or other identifying information can be shared. Other than a project speaker who has provided a signed P.E.O. Photograph and Publicity Consent Form to the s/p/d, no photos of recipients shall be displayed. See \* below.
- P.E.O. Program for Continuing Education—Project display can share the number of PCE recipients per local chapter and the total number of grants and total dollar amount awarded in the s/p/d. No names, individual amounts or other identifying information can be shared. Other than a project speaker who has provided a signed P.E.O. Photograph and Publicity Consent Form to the s/p/d, no photos of recipients shall be displayed. See \* below.
- P.E.O. Scholar Awards—Project display can share the chapters that nominated a student who completed the application process and information pertaining to recipients’ studies. If the recipient has provided a signed P.E.O. Photograph and Publicity Consent Form to the s/p/d, their name, photos and other personal information may be displayed.
- P.E.O. STAR Scholarship— Project display can share the chapters that recommended a student who completed the application process and information pertaining to recipients’ studies. If the recipient has provided a signed P.E.O. Photograph and Publicity Consent Form to the s/p/d, their name, photos and other personal information may be displayed.

**Project Displays**

\* Although we must be careful to not share personal identifying information, compelling stories can still be shared. For instance, “Chapter AB sponsored a single mother for a PCE grant. Their recipient expressed her gratitude to P.E.O. with the following statement...” Communicate with your local chapters and ask them to share these stories with your s/p/d chairs and advisers. Such stories can make a display come alive. Read the Project Speakers section below for information on highlighting project speakers in the displays.

## 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 comply with the P.E.O. Pyramid of Giving. This policy provides a three-tiered pyramid representing the three levels of contributions—International projects, s/p/d 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 s/p/d 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 s/p/d projects, which shall not exceed International project support.*

See also: [P.E.O. Finances & Service Policy](#) in *P.E.O. Fundraising—Policies*, page 17.

<b>P.E.O. FUNDRAISING</b>	
<b>(Including sales of goods and services, raffles, auctions, etc.)</b>	
<p>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. All chapter fundraising activities must follow local health guidelines.</p>	
<b>General Fundraising Policies</b>	
<ul style="list-style-type: none"> <li>In keeping with the mission of P.E.O., the focus of chapter funds and fundraising activities shall be International Chapter projects, followed by s/p/d 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.</li> <li>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.</li> </ul>	<b>P.E.O. Finances &amp; Service Policy</b>
<ul style="list-style-type: none"> <li>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:   <b><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></b> </li> </ul> <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>	<b>Required Notice</b>
<ul style="list-style-type: none"> <li>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.</li> </ul>	<b>Payments for Chapter Fundraisers</b>
<ul style="list-style-type: none"> <li>No member’s personal vehicle may be used for hire as a fundraising activity.</li> <li>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.</li> </ul>	<b>Use of Personal Vehicle</b>
<ul style="list-style-type: none"> <li>The cover of The P.E.O. Record may not be copied or used for commercial or fundraising purposes, except by the original artist.</li> </ul>	<b>Cover of P.E.O. Record</b>
<ul style="list-style-type: none"> <li>Chapters may advertise items for sale in the Fundraising Marketplace section of the P.E.O. Hub. Thumbnail pictures of the sale item(s) may be included with the posting in accordance with the established fee structure.</li> </ul>	<b>P.E.O. Hub Advertisements</b>

<ul style="list-style-type: none"> <li>• All chapter fundraisers must be conducted and promoted using only volunteer labor.</li> <li>• 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.</li> </ul> <p>(Exception: Casino/Bingo Events must use a professional party company. Refer to Policies section of IOLC <a href="#">Casino/Bingo Events</a>.)</p>	<p><b>Volunteer Labor</b></p>
<ul style="list-style-type: none"> <li>• 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"> <li>○ 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.) <b>OR</b></li> <li>○ 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.</li> </ul> </li> </ul>	<p><b>Joint Chapter Fundraisers</b></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"> <li>1. The item(s) for sale or the name of the fundraising event</li> <li>2. Applicable date(s)</li> <li>3. Price</li> <li>4. Location</li> <li>5. P.E.O. chapter contact information</li> <li>6. A picture or graphic</li> </ol> <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"> <li>1. The item(s) for sale or the name of the fundraising event</li> <li>2. A picture or graphic</li> <li>3. Requests for information must be handled through private messaging.</li> </ol> <ul style="list-style-type: none"> <li>• 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.”</li> <li>• 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.</li> </ul>	<p><b>Promotion of Fundraisers on Social Media</b></p>
<p>Before any sale of goods, determine possible sales tax liability. Contact the state or district department of revenue or review the sales tax liability rules online related to an <i>upcoming</i> fundraiser held by a 501(c)(4) organization. When corresponding with your department of revenue, describe your proposed fundraiser only. Do not offer any information concerning past fundraisers or other chapters.</p>	<p><b>Sales Tax</b></p>

<p>Net income from P.E.O. fundraising activities (excluding P.E.O. Bed &amp; Breakfast) must be used for the following:</p> <ul style="list-style-type: none"> <li>• P.E.O. projects</li> <li>• Other qualified educational and/or charitable purposes</li> <li>• Chapter operating expenses/retained in chapter funds</li> <li>• Other activities as approved by the chapter</li> </ul>	<p><b>Fundraising Net Income</b></p>
<p>When sales of goods or services occur, details shall be reported annually on Form IRS-LC (for U.S. chapters), including an itemized account of how the profit was allocated.</p>	<p><b>Reporting of Fundraising Activity on IRS-LC</b></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><b>Private Inurement</b></p>
<p>Notifying other chapters of items for sale:</p> <ul style="list-style-type: none"> <li>• The rules of circularization apply as described in Standing Rule #2 of the Constitution, Bylaws and Standing Rules of the P.E.O. Sisterhood.</li> <li>• Refer to Policies section of the IOLC <a href="#">Circularization</a> for definition and examples.</li> </ul>	<p><b>Circularization</b></p>
<p><b>Fundraising Activities</b></p>	
<p><b>Sales of purchased or donated items by local or s/p/d chapters, reciprocities or P.E.O. Groups</b></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><b>** Before beginning any fundraising activity, review the <a href="#">General Fundraising Policies</a> **</b></p> <ul style="list-style-type: none"> <li>• Sales must be to individuals only and NOT FOR RESALE.</li> <li>• There is no limit on the value of items.</li> <li>• 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.)</li> <li>• Chapters may sell items using a local or s/p/d chapter website (with permission of the executive board of s/p/d chapter). Sales through a third-party platform such as Amazon or Etsy are not allowed.</li> <li>• Two separate entities, each exempt from paying income tax, may not each make a profit on the sale of the same item.</li> </ul>	<p><b>Direct Sale of Goods (with advance purchase of goods)</b></p>

<p><b>Sale of items through a third-party vendor</b></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><b>**Before beginning any fundraising activity, review the <a href="#">General Fundraising Policies</a>**</b></p> <ul style="list-style-type: none"> <li>• Sales must be to individuals only and NOT FOR RESALE.</li> <li>• There is no limit on the value of items.</li> <li>• The cost of items shall not vary based on the quantity sold.</li> <li>• The maximum duration of each fundraiser is 30 consecutive days and may not be repeated during the local chapter year (March through February).</li> <li>• 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.)</li> <li>• Delivery of items to the final buyer can be handled by the vendor OR sent to the chapter for final delivery.</li> <li>• Chapters shall not link to any non-P.E.O. website on social media.</li> <li>• 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.</li> <li>• Two separate entities, each exempt from paying income tax, may not each make a profit on the sale of the same item.</li> </ul> <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. (Refer to <a href="#">Private Inurement</a>.)</p>	<p><b>Indirect Sale of Goods (without advance purchase of goods)</b></p>
<p>Local or s/p/d chapters, reciprocities and P.E.O. Groups may sell services.</p> <p><b>**Before beginning any fundraising activity, review the <a href="#">General Fundraising Policies</a>**</b></p> <ul style="list-style-type: none"> <li>• Sales must be to individuals only and NOT FOR RESALE.</li> <li>• No limit on value of services.</li> <li>• All work in carrying on such sales must be done by the members or others for the organization WITHOUT COMPENSATION.</li> <li>• No member's personal vehicle may be used for hire as a fundraising activity. (Refer to <a href="#">Use of a Personal Vehicle</a>.)</li> <li>• No sales of services are allowed via websites.</li> </ul>	<p><b>Sales of Services</b></p>

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

- Due to state regulations, raffles and other games of chance are not permitted in the State of California.
- 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 Audit 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 [Payments for Chapter Fundraisers](#).)
  - 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><b>**Before beginning any fundraising activity, review the <a href="#">General Fundraising Policies</a>**</b></p> <ul style="list-style-type: none"> <li>• Sales must be to individuals only and NOT FOR RESALE.</li> <li>• No limit on value of services.</li> <li>• All work in carrying on such sales must be done by the members or others for the organization WITHOUT COMPENSATION.</li> <li>• 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.</li> <li>• Online auctions must adhere to the preceding guidelines in addition to the following:             <ul style="list-style-type: none"> <li>○ Maximum duration of each auction is 30 consecutive days and may not be repeated during the local chapter year (March through February).</li> <li>○ Access to online platform must be provided through a private link.</li> </ul> </li> </ul>	<p><b>Auctions (Live and Silent)</b></p>
<p><b>**Before beginning any fundraising activity, review the <a href="#">General Fundraising Policies</a>**</b></p> <ul style="list-style-type: none"> <li>• Due to complexity and variety of these programs, please contact the P.E.O. Executive Office to request approval for participation.</li> <li>• Participation requirements are determined by the sponsoring travel company:             <ul style="list-style-type: none"> <li>○ The chapter may be asked to provide proof of IRS status. Local and s/p/d chapters are classified as Section 501(c)(4). If the sponsoring travel company requires proof of charitable or 501(c)(3) status, chapters cannot participate.</li> <li>○ Other requirements for participation may determine the chapter’s ability to qualify.</li> </ul> </li> <li>• Limited to one trip per local chapter year (March through February)</li> </ul>	<p><b>Travel Programs</b></p>
<p><b>**Before beginning any fundraising activity, review the <a href="#">General Fundraising Policies</a>**</b></p> <p>Due to state regulations, casino/bingo events are not permitted in the State of California.</p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• Only non-cash prizes can be offered at individual values under \$500.</li> </ul> <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><b>Casino/Bingo Events</b></p>
<p><b>**Before beginning any fundraising activity, review the <a href="#">General Fundraising Policies</a>**</b></p> <ul style="list-style-type: none"> <li>• Due to complexity and variety of these programs, please contact the P.E.O. Executive Office to request approval for participation.</li> <li>• Participation requirements determined by the sponsoring company             <ul style="list-style-type: none"> <li>○ May be asked to provide proof of IRS status. Local and s/p/d chapters are classified as Section 501(c)(4). If the sponsoring company requires proof of charitable or 501(c)(3) status, P.E.O. chapters cannot participate.</li> <li>○ Other requirements for participation may determine the chapter’s ability to enroll.</li> </ul> </li> </ul>	<p><b>Scrip Programs</b></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.

- The purpose of convention is to conduct the business of the P.E.O. Sisterhood. Because of this, sales at convention shall only be by hostess chapters and/or the s/p/d chapter and shall be limited to items sold to help defray convention costs. 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, auctions may be held during in-person conventions, each individual item with a value not to exceed \$500. Bids for silent auctions 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 executive 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"> <li>• 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)</li> <li>• 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, website, logos and/or established slogans. No endorsement or advertising of company services or products is allowed. (IP, V)</li> <li>• 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)</li> <li>• Sponsors may display items and may be permitted to name a room or area of convention as a sponsorship opportunity (e.g., ABC Company Hospitality Area). They may hand out samples of product or other giveaways. No goods or services may be sold at convention as part of the sponsorship. It is to be emphasized that P.E.O. cannot encourage, advertise or endorse any of their products or services.</li> <li>• Questions regarding these guidelines should be directed to the Director of Finance/Treasurer of International Chapter. (IP, V)</li> </ul>	<p><b>Sponsorship of Local &amp; S/P/D Chapter Events &amp; Convention Hostess Chapters</b></p>
<ul style="list-style-type: none"> <li>• 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)</li> <li>• 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)</li> <li>• 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). (IP, V)</li> </ul>	<p><b>Hostess Groups for State or District Conventions</b></p>

**LOCAL CHAPTERS IN NON-CHARTERED TERRITORY**

<ul style="list-style-type: none"> <li>• If bylaws and standing rules have not been amended during the year, the recording secretary of a chapter in non-chartered territory shall notify the organizer of International Chapter in March indicating “no change.”</li> <li>• 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.</li> </ul> <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 amended bylaws and standing rules be sent to the organizer of International Chapter.</p>	<p><b>Bylaws &amp; Standing Rules</b></p>
<ul style="list-style-type: none"> <li>• Delegate             <ul style="list-style-type: none"> <li>○ One delegate from every three local chapters or major fraction thereof in each non-chartered 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.</li> </ul> </li> <li>• Expenses             <ul style="list-style-type: none"> <li>○ 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.</li> <li>○ Transportation is paid by the chapter(s) the delegate(s) represent.</li> </ul> </li> <li>• Celebration of Life             <ul style="list-style-type: none"> <li>○ Members of chapters in non-chartered territory entering chapter eternal during the two local chapter P.E.O. years (March 1 through February 28/29) prior to Convention of International Chapter will be recognized as long as the member’s death was reported no later than the annual report in the year of Convention of International Chapter.</li> </ul> </li> </ul>	<p><b>Convention of International Chapter</b></p>
<ul style="list-style-type: none"> <li>• Chapters in non-chartered territory shall send two copies of their yearbook to the organizer of International Chapter annually.</li> <li>• Reciprocity groups and P.E.O. Groups in non-chartered territory shall send one copy of their yearbook or schedule of meetings to the organizer of International Chapter annually.</li> </ul>	<p><b>Yearbooks</b></p>
<ul style="list-style-type: none"> <li>• 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.</li> <li>• The excise tax forms, sent to chapter presidents and treasurers by email from the P.E.O. Executive Office, must be completed quarterly and returned by email to the executive office by the deadline.</li> </ul>	<p><b>Excise Tax – Only for Chapters in Hawaii</b></p>

- The P.E.O. Executive Office will request reimbursement of the excise tax remitted for each local chapter by sending an invoice in July of each year.

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## EXHIBIT A

### PROCEDURE FOR SECURING CHANGE IN LOCATION OF A LOCAL CHAPTER OF THE P.E.O. SISTERHOOD

1. A proposal for change in location of a local chapter shall be presented at a meeting of the chapter to be voted upon at the next meeting.
2. At the next chapter meeting the chapter will vote (requires a favorable vote of 2/3 of members present). If the motion vote is favorable, those voting pro shall sign the petition. The completed petition ([Exhibit B](#)) is sent to the state/provincial/district (s/p/d) president. If the vote is negative, the petition is not signed by the member(s) voting pro but the remainder of the report is completed and sent to the s/p/d president.
3. The executive board of the s/p/d chapter shall act upon the petition by a vote of the s/p/d executive board.

Following the favorable vote of the executive board of the s/p/d chapter, the president shall:

- Notify the executive director of action taken and date on which the change in location shall become effective by sending the Petition of Local Chapter for Change in Location of Chapter Designation.
  - Notify the president of the local chapter of action taken by the executive board of the s/p/d chapter, including the effective date of change of location (the date the s/p/d executive board voted on the change).
4. Upon receipt of the notification from the s/p/d president, the executive director shall:
    - Prepare and send the completed certificate to the president of the s/p/d chapter with a letter of instructions for proper signatures and seal and a statement of the amount of the required fee of \$15.
    - Send copies of the letter to the secretary of the s/p/d chapter and president of the local chapter.
    - Notify the P.E.O. Membership Department.
  5. The treasurer of the local chapter shall forward payment of the fee to the executive director.
  6. At the next s/p/d convention, an announcement is made of the change in location of a local chapter(s).

## EXHIBIT B

# PETITION OF LOCAL CHAPTER FOR CHANGE IN LOCATION OF CHAPTER DESIGNATION

P.E.O. SISTERHOOD

\_\_\_\_\_, \_\_\_\_\_  
(Date Petition Submitted)

The following members of Chapter \_\_\_\_\_, city of \_\_\_\_\_,  
S/P/D of \_\_\_\_\_, request permission to change the name of  
Chapter \_\_\_\_\_, city of \_\_\_\_\_, S/P/D of \_\_\_\_\_,  
to Chapter \_\_\_\_\_, city of \_\_\_\_\_, S/P/D of \_\_\_\_\_,

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

Number of active, resident members of Chapter \_\_\_\_\_  
Request for Change in Location of Chapter voted on \_\_\_\_\_  
(Date)

Number of members Present \_\_\_\_\_  
Number of members voting Pro \_\_\_\_\_  
Number of members voting Con \_\_\_\_\_

(This requires a favorable vote of  
two-thirds (2/3) of the members present)

\_\_\_\_\_  
\_\_\_\_\_  
Local Chapter President  
\_\_\_\_\_  
Local Chapter Recording Secretary

Effective date\* of change of location: \_\_\_\_\_  
\*Date s/p/d executive board voted on this request (month) (day) (year)

\_\_\_\_\_  
S/P/D President

## EXHIBIT C

### P.E.O. GENERAL LIABILITY INSURANCE

**For P.E.O. meetings or functions held in a member's home  
or at a local church, community hall or private facility**

#### **What Does This Coverage Protect?**

This coverage protects P.E.O. (International Chapter, state and local chapters, members, officers and employees) from liability, i.e., bodily injury to a third party or damage to property belonging to a third party caused by negligence.

#### **Key Word – Negligence**

If, for instance, a member or guest slips and falls while attending a P.E.O. function, coverage only applies if there is negligence on the part of P.E.O., its member, employee or officer, such as allowing a *known* hazard or unsafe condition to exist. For this reason, all incidents of injury to persons or damage to property should be reported. A determination as to possible negligence will be made when necessary. Instructions and phone numbers for doing this are found on the Claims Reporting Statement, which is held by each state and local chapter president.

In such circumstances, P.E.O., its member, employee or officer is protected and would be defended against any resulting lawsuit.

#### **Medical Expense Coverage**

In addition to the liability portion of the coverage, the policy also provides a limited amount of “Medical Expense” coverage. This coverage can be used to pay the medical expenses of the injured party but this coverage is available only to guests or members of the public and *does not apply to P.E.O. members*. The Medical Expense coverage applies regardless of negligence (meaning, the P.E.O. does not have to be liable for the injury in order for this coverage to apply). However, the injured party should first look to his or her own medical insurance for reimbursement of medical expenses.

Incidents of the kind discussed in the foregoing, if occurring in a member's home, should also be reported to the homeowner's insurer, as similar coverage usually exists there. Under the “medical expense” portion of the homeowner's insurance, the P.E.O. member probably has coverage.

#### **Event Held at Establishment Selling Liquor**

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. It is also up to the establishment to determine whom to serve, and more importantly, whom not to serve.

Under no circumstance may a P.E.O. chapter, reciprocity or other group of chapters obtain a liquor license.

#### **Auto Liability**

Members driving their own cars to pick up and transport participants to a meeting or event must rely on their own automobile liability insurance for their protection.

#### **Biological Agent Claims**

As a result of the COVID-19 pandemic, an exclusion has been added to P.E.O.'s insurance policy for injuries caused by “biological agents,” which is defined to include: viruses, pathogens, fungi, mold, mildew and other microorganisms. This exclusion means that any claims that arise as a result of a “biological agent” would **not be covered** by P.E.O.'s insurance policy.

## INSURANCE CERTIFICATE REQUEST FORM

All P.E.O. meetings and functions are covered by International's General Liability Insurance policy. Please complete this form for a facility requesting a proof of Liability Insurance Certificate.

*The Certificate of Insurance will be sent directly to the facility contact that you have named. The chapter contact will also receive a copy. Please refer to the explanation of P.E.O. International's General Liability coverage and how it applies.*

**Note: International's Liability Insurance Policy renews every year on July 1. Requests for functions scheduled after this date will be processed after the renewal occurs.**

### EVENT INFORMATION

Title of Event: \_\_\_\_\_

Chapter: \_\_\_\_\_ Date of Event: \_\_\_\_\_

Name of location or facility where event is to be held: \_\_\_\_\_

Does the event involve physical activity (ex. Walking or running program, etc.)?  Yes  No

If Yes, please have participants complete the Waiver & Release of Liability form included.

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Name & Title of Contact Person or Facility: \_\_\_\_\_

**ADDITIONAL EVENTS:** Please complete all information above for each event. (Extra sheet included)

### PERSON MAKING REQUEST

Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

P.E.O. Chapter Letters: \_\_\_\_\_ Chapter City: \_\_\_\_\_

Send requests to:

P.E.O. Executive Office  
Attn: Insurance Certificate Request  
3700 Grand Avenue  
Des Moines, IA 50312

[receptionist@peodsm.org](mailto:receptionist@peodsm.org)

Fax: (515) 255-3820

## INSURANCE CERTIFICATE REQUEST ADDITIONAL EVENTS

### EVENT (2)

Title of Event: \_\_\_\_\_

Chapter: \_\_\_\_\_ Date of Event: \_\_\_\_\_

Name of location or facility where event is to be held: \_\_\_\_\_

Does the event involve physical activity (ex. Walking or running program, etc.)?  Yes  No

If Yes, please have participants complete the Waiver & Release of Liability form included.

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Name & Title of Contact Person or Facility: \_\_\_\_\_

### EVENT (3)

Title of Event: \_\_\_\_\_

Chapter: \_\_\_\_\_ Date of Event: \_\_\_\_\_

Name of location or facility where event is to be held: \_\_\_\_\_

Does the event involve physical activity (ex. Walking or running program, etc.)?  Yes  No

If Yes, please have participants complete the Waiver & Release of Liability form included.

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Name & Title of Contact Person or Facility: \_\_\_\_\_

### EVENT (4)

Title of Event: \_\_\_\_\_

Chapter: \_\_\_\_\_ Date of Event: \_\_\_\_\_

Name of location or facility where event is to be held: \_\_\_\_\_

Does the event involve physical activity (ex. Walking or running program, etc.)?  Yes  No

If Yes, please have participants complete the Waiver & Release of Liability form included.

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Name & Title of Contact Person or Facility: \_\_\_\_\_

## INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) GLOSSARY OF TERMS AND ABBREVIATIONS

<ul style="list-style-type: none"> <li>Received by the local chapter from the state/provincial/district (s/p/d) chapter indicating approval of the annual report. This notice includes the final numbers for active and inactive members for that local chapter.</li> </ul>	<b>Annual Report Release</b>
<ul style="list-style-type: none"> <li>Abbreviation for International Chapter of the P.E.O. Sisterhood.</li> </ul>	<b>IC</b>
<ul style="list-style-type: none"> <li>The P.E.O. Member ID # is the official method for identifying P.E.O. members.</li> <li>Seven-digit P.E.O. Member ID # locations:               <ul style="list-style-type: none"> <li>Membership Roster</li> <li>Back cover of The P.E.O. Record above member's address</li> <li>My Profile on the P.E.O. Hub</li> </ul> </li> </ul>	<b>Member ID #</b>
<ul style="list-style-type: none"> <li>Reference to the Membership Department in the P.E.O. Executive Office:   <div style="text-align: center;"> <a href="mailto:membership@peodsm.org">membership@peodsm.org</a> OR            Membership Department            P.E.O. Executive Office            3700 Grand Avenue            Des Moines, Iowa 50312-2899         </div> </li> </ul>	<b>Membership Dept.</b>
<ul style="list-style-type: none"> <li>Process of an inactive member becoming an active member.</li> </ul>	<b>Reinstatement</b>
<ul style="list-style-type: none"> <li>Abbreviation for "State/Provincial/District" Chapter or "state/province/district."</li> </ul>	<b>S/P/D or s/p/d</b>
<ul style="list-style-type: none"> <li>Portion of the P.E.O. Ceremony of Initiation, the section printed between the rows of daisies.</li> </ul>	<b>Special Work</b>
<ul style="list-style-type: none"> <li>Member who signs the Sponsor for Membership form proposing a woman for P.E.O. membership.</li> </ul>	<b>Sponsor</b>
<ul style="list-style-type: none"> <li>Term used by the chapter to which a member has transferred.</li> </ul>	<b>Transfer In</b>
<ul style="list-style-type: none"> <li>Term used by the chapter from which a member has transferred.</li> </ul>	<b>Transfer Out</b>
<ul style="list-style-type: none"> <li>An active member who lives in your community but belongs to a chapter in another area.</li> </ul>	<b>Unaffiliate</b>

# INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC)

## GLOSSARY OF FORMS

<ul style="list-style-type: none"><li>Annual report used to record all membership changes not indicated on the Membership Roster, including updates on inactive members, and to record membership totals (active and inactive members) as of March 1.</li></ul>	<b>Annual Report</b>
<ul style="list-style-type: none"><li>Replaces the chapter General Enrollment Book.</li><li>Lists all P.E.O.s who have been a chapter member since 1980. Any members not listed are those who transferred out or died prior to 1980 – information about these members may be found in the retired General Enrollment Book.</li></ul>	<b>Chapter Membership History (CMH) Record</b>
<ul style="list-style-type: none"><li>Form used by a local chapter to invite a member to transfer.</li></ul>	<b>Invitation to Transfer</b>
<ul style="list-style-type: none"><li>Serves as reference document for annual reports and lists members who were living as of March 1 current year.</li></ul>	<b>Membership Roster</b>
<ul style="list-style-type: none"><li>Form sponsors sign when presenting and proposing a name for membership.</li></ul>	<b>Sponsor for Membership</b>