



# Local Officer Training

Welcome to all Alabama Local Chapter Officers

# President and Vice President

Adapted from the HUB



# Training Overview

- ▶ Orientation to administrative processes
- ▶ Assist in streamlining the work of the local chapter
- ▶ Enjoy your duties as president or vice president



# Six Key Areas

1

**Order of the Meeting**

2

**Presentatio  
n of Names  
for  
Membership**

3

**Balloting  
on a  
Candidate**

4

**Ceremony of  
Initiation**

5

**Membership  
Transactions  
(*Transfers,  
Reinstatements*)**

6

**Installation  
of Officers**





# Effective Leadership

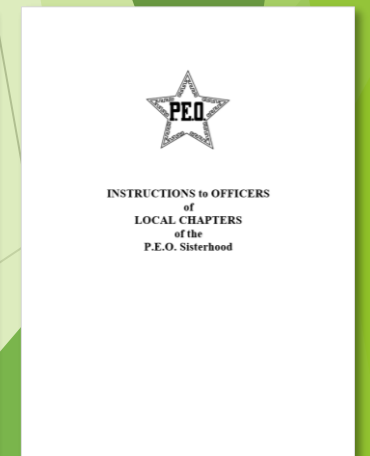
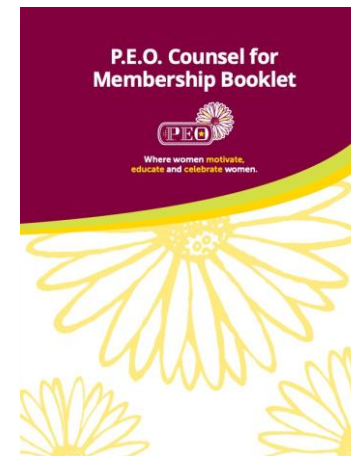
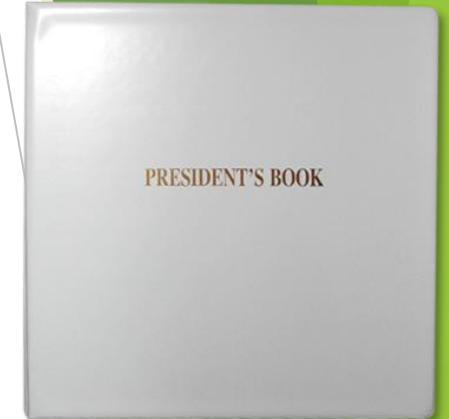
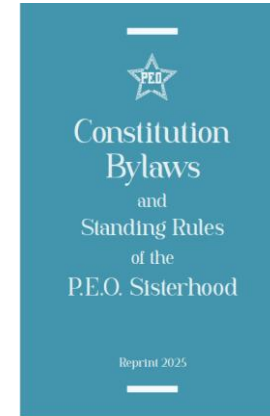
- ▶ Effective leadership can take place when the leader *feels* confident and realizes that she *really is* competent.
- ▶ There are *three* key reasons why you should have confidence in your ability to lead:
  1. You have all the tools needed to **do the job well** - you only have to become familiar with them.
  2. There is a chapter full of your sisters who **want you to succeed and will do anything they can to help** - you only need to ask.
  3. Your state/provincial/district (s/p/d) officers and International Chapter officers are very willing to help you **not only succeed but enjoy the journey.**



# 1 Order of the Meeting

## ► Resources

1. P.E.O. Constitution
2. President's Book
3. P.E.O. Counsel for Membership Booklet
4. Instructions to Officers of Local Chapters (IOLC)
5. S/P/D bylaws and standing rules



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# 1 Order of the Meeting

- ▶ President's Book
  - ▶ Order of Business for chapter meetings
- ▶ Meeting agenda

1. Call to Order
2. Opening Ode - Objects and Aims
3. Devotions
4. Formal Opening of Meeting

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# 1 Order of the Meeting

▶ Meeting agenda

5. Reading of Minutes

6. Initiation

7. Report of Treasurer

8. Report of Corresponding Secretary and Reading of Correspondence

9. Chapter Business

*A. Committees*

*B. Unfinished Business*

*C. New Business*

# 2

## Presentation of Names for Membership

- ▶ Sponsor for Membership form
  - ▶ Three sponsoring sisters
  - ▶ Regular or special meeting
- ▶ A name which does not receive three sponsors when it is first presented will be offered at the next meeting.
  - ▶ See **Appendix 9** of the President's Book.



The form is titled "SPONSOR FOR MEMBERSHIP" and features a P.E.O. star logo. It includes fields for "Date", "To Our Sisters:", "Name", "Address", "City", "State/Province", "Zip/Postal Code", "Phone", and "Email". A section for signatures is labeled "Signed" and contains three numbered lines (1, 2, 3). Below this is a section for "Members of" with fields for "Chapter", "City", and "S/P/D". At the bottom, there is a note: "THIS FORM TO BE FILLED OUT IN ACCORDANCE WITH THE INSTRUCTIONS FOR PRESENTING AND PROPOSING NAMES, TO BE FOUND IN PRESIDENT'S BOOK." and a page number "123". A red oval highlights the signature lines.



# 3

## Balloting on a Candidate

- ▶ Appendix 10 outlines the procedure.
- ▶ See also all references to balloting in the IOLC.

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# 3 Balloting on a Candidate

## In-Person Meeting Flow Chart

Vice president distributes and collects ballots. ➔ President reviews ballots and announces results.

## Virtual Meeting Flow Chart

Prior to the start of the meeting, videoconference host sets up ballot(s) utilizing the platform's polling feature. ➔ President must be able to receive ballots submitted by video polling, email and text during the meeting directly after asking all to vote. ➔ President reviews all ballots submitted and announces results.

## Hybrid Meeting Flow Chart

Prior to the start of the meeting, videoconference host sets up ballot(s) utilizing the platform's polling feature. ➔ President must be able to receive ballots submitted by members attending in person, video polling, email and text during the meeting directly after asking all to vote. ➔ President recording secretary reviews all ballots submitted and announces results.

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# 3

## Balloting on a Candidate

- The **president** asks the recording secretary to read the name of the woman proposed and her sponsors.
- The **president** then asks if a sponsor would like to tell the membership more about the candidate.
- The **president** asks the treasurer for the number entitled to vote.
- Hearing the number entitled to vote, the recording secretary makes a note of the number.
- The **president** reads the instructions for balloting.
- After voting is complete, ballots are collected and/or votes are tallied.

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# 3 Balloting on a Candidate

- ▶ President's Book agenda item 13
- ▶ Appendices 10 and 11
- ▶ IOLC

# 4 Ceremony of Initiation

- ▶ May be conferred in different formats
- ▶ Any active member may be invited to conduct the Ceremony of Initiation.
- ▶ The Ceremony of Initiation may be conferred at a regular or special meeting.

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# 4 Ceremony of Initiation

- ▶ Memorize
  - ▶ Discretion of **chapter** to read
- ▶ Official booklet may not be altered or placed in a cover
- ▶ Members of other chapters may serve as pro tem officers

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# 4 Ceremony of Initiation

- ▶ Practice = beautiful part of P.E.O. experience
- ▶ Initiation attire for ceremony
  - ▶ See **Appendix 4** of the President's Book

# 5 Membership Transactions

- ▶ President and vice president must have a clear working knowledge of the process for membership transactions.
- ▶ Corresponding secretary is ultimately responsible for recording and submitting all membership transactions.
- ▶ President encourages promptness in reporting changes.

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# 5 Membership Transactions

## ▶ Transfers

- ▶ Local chapters may not extend or accept transfers in February.
- ▶ Chapter votes to invite member into chapter and corresponding secretary sends invitation to transfer.
- ▶ Invited member sends acceptance letter.
- ▶ Reading acceptance letter at chapter meeting completes transfer.
- ▶ Corresponding secretary reports the transfer on the P.E.O. Hub.
- ▶ P.E.O. Membership Department notifies member's former chapter of transfer.
- ▶ Corresponding secretary of former chapter makes note of transfer out.

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# 5 Membership Transactions

- ▶ Reinstatements (Does **not require** a vote of the chapter.)
  - ▶ Inactive member notifies by email or post that she wishes to reinstate.
  - ▶ She sends reinstatement fee of \$35 (\$50 on or after March 1, 2026).
  - ▶ No chapter vote required - payment of fee completes reinstatement.
    - If an inactive member is reinstating and transferring, her reinstatement is effective as of the date of the chapter meeting her letter accepting the invitation to transfer is read.
  - ▶ Corresponding secretary reports reinstatement on the P.E.O. Hub.
  - ▶ Local chapter treasurer issues membership card to member.
  - ▶ The reinstatement date is the date the reinstatement fee is received by the chapter.

# 6 Installation of Officers

- ▶ Officers are elected annually at or before first regular meeting in March.
- ▶ Installation must occur at first March meeting.
- ▶ If an officer cannot be installed by May 1, the president appoints a new officer, which the chapter ratifies.

# Important Additional Resources

- ▶ Trainings for other officers are available and can be found in the Resources/Library section on the P.E.O. Hub.



# Summary

We have reviewed the work of the local chapter for the president and vice president in these six major categories:

1. **Order of Business:** The order groups actions together to allow efficient use of time.
2. **Sponsoring a Candidate:** Sponsoring a candidate requires three signatures.
3. **Balloting on a Candidate:** Review the balloting process specific to the format of meeting (in-person, virtual or hybrid).





# Summary

4. **Ceremony of Initiation:** Use Item of Business 6 in the President's Book.
5. **Membership Transactions:** A clear working knowledge of the way transfers and reinstatements are handled will help with these important procedures.
6. **Installation of Officers:** Officers are elected annually at or before the first regular meeting in March. Installation must take place at the first regular meeting in March.

Questions???