



Local Officer Training

Welcome to all Alabama Local Chapter Officers

Recording Secretary

Adapted From the HUB



Training Overview

- Provides assistance for the duties of recording secretary
- Helps you enjoy your duties! ➤

Four Key Areas

1

Resources

2

**Duties Outlined in
P.E.O. Constitution**

3

**Duties Outlined in
President's Book
*(Order of
Business)***

4

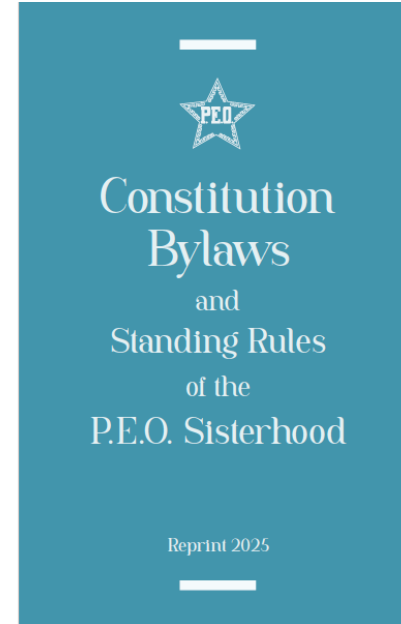
**Duties Outlined in
Instructions to
Officers of Local
Chapters (IOLC)**



1

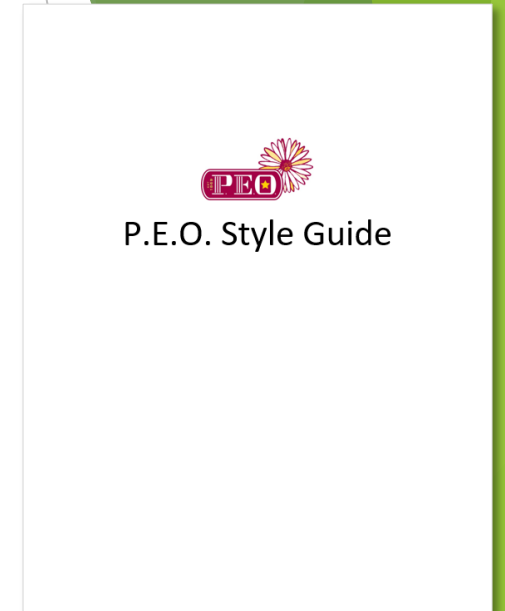
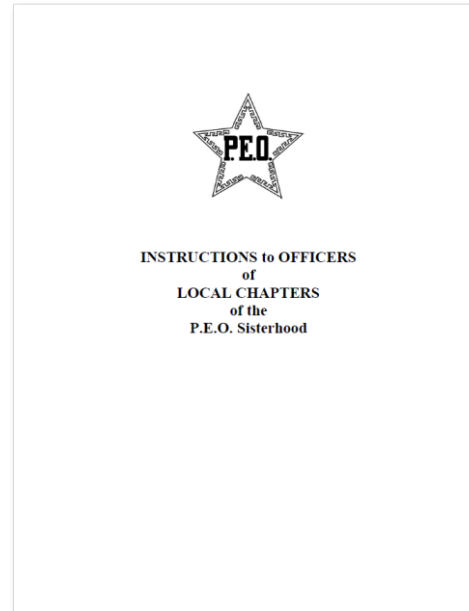
Resources

- ▶ P.E.O. Constitution
 - ▶ Part III, ARTICLE V, Sec. 4
- ▶ State, provincial or district (s/p/d) chapter bylaws
- ▶ President's Book



1 Resources

- Instructions for Minutes
- Template for Minutes
- IOLC
- P.E.O. Style Guide ➤



2 Duties Outlined in the Constitution

1. **Keep a record** of proceedings of all meetings and **authenticate** records.
2. **Read** all papers not considered correspondence.
3. **Record** answers “pro” and “con” when a vote is taken by roll call.
4. **Sign** official forms as required.
5. **Send** a copy of local chapter bylaws and standing rules to the state in March.



3

Duties Outlined in the President's Book (*Order of Business*)

- ▶ Ask your president to review with you items in the President's Book relating to your duties.
- ▶ When possible, sit near the president so you can hear, see and work together as a team.
- ▶ Refer to your Recording Secretary's Record Book for instructions on recording minutes for regular and special meetings.



3

Duties Outlined in the President's Book (*Order of Business*)

- **Call to Order**
 - If president and vice president are absent, follow the procedures outlined in Appendix 3 to handle the nomination for a chair for the meeting.
 - If a pro tem officer serves for a meeting, it is written in the minutes,
“By general consent, Marie Stewart served as guard for the meeting.”
- **Record Opening Ode, Objects and Aims, devotions and formal opening of meeting.**



3 Duties Outlined in the President's Book (*Order of Business*)

- **Read minutes of previous meeting.**
 - Note minutes are either approved or approved as corrected and add date.
- **Participate in Ceremony of Initiation and record in the minutes.**



3

Duties Outlined in the President's Book

Order of Business

- **Report of Treasurer**
 - Note and record number of members at roll call.
 - Copy summary of treasurer's monthly report.
 - Record motion and vote to allow bills and list them.



3

Duties Outlined in the President's Book

Order of Business

- **Report of Corresponding Secretary**
 - Record recipient(s) and subject(s) of correspondence sent.
 - Record a transfer in, transfer out or reinstatement following the *Instructions for Minutes* in Recording Secretary's Record Book.
- **Chapter Business**
 - Record each item of business and actions taken; record what was *done*, not what



3

Duties Outlined in the President's Book

Order of Business

- **Presentation of Names for Membership**
 - Record presentation of name(s) for membership, using wording in the *Instructions for Minutes* in Recording Secretary's Record Book.
- **Proposals for Membership**
 - Record name(s) proposed for membership, using wording in the *Instructions for Minutes* in Recording Secretary's Record Book.



3

Duties Outlined in the President's Book (*Order of Business*)

- **Balloting**
 - Read name of woman proposed and three sponsors prior to balloting.
 - For in-person meetings, provide the vice president with ballots and a container.
 - Record the result(s) of the ballot(s) using the wording in the *Instructions for Minutes* in Recording Secretary's Record Book



3

Duties Outlined in the President's Book *(Order of Business)*

Record Suggestions for Good of the Chapter.

- Include changes of contact information or items of loving concern for members.
- Do not record other news of personal matters or community events, which should be shared after the meeting is closed.
- **Make final statement.**



4 IOLC

- IOLC = “best friend” to each officer
- Read document carefully
 - Focus on recording secretary section, policies and glossary
 - All job duties outlined and explained
- Retention Record
- Available online for reference, download or print
 - P.E.O. Hub in the Resources/Library section ➤

4 IOLC

- Chapter Bylaws and Standing Rules
 - Keep a copy of your chapter's bylaws and standing rules following instructions in the front of the Recording Secretary's Record Book.
 - In March, suit any amended version to the designated officer of your state.



Summary

- ▶ Maintain the required supplies on the List of Supplies for Officers of Local Chapters available and follow the Retention Record for keeping these supplies current.
- ▶ In the absence of the president and vice president, call the meeting to order and take nominations for chair pro tem as outlined in **Appendix 3** of the President's Book.
- ▶ At the discretion of your chapter, you will memorize the recording secretary's part for the Ceremony of Initiation or prepare for reading from an official booklet. A proxy officer for the Ceremony of Initiation is another option.

*(continued on next
slide)*





Summary

- ▶ Officer transition is important - at the end of your term of office, train your successor and turn over all supplies from the office. **Please encourage her to take this online training.**
- ▶ Having taken the time to become familiar with the role of the recording secretary through this training module your confidence level should be enhanced. **You are up to the task!**

Questions???