



Responsibilities and Time Commitments for Local Chapter P.E.O. Officers

Nearly every P.E.O. who has served as an officer of her chapter has a story to tell about the sister who encouraged her to step into a leadership role and supported her while she served the chapter. Who among us would have served without the 'help' of our sisters?

Once elected, officers are asked to be familiar with the guiding principles and governing documents of P.E.O., to become knowledgeable in the subject matter of their office, and to serve as the point of contact—an expert for her sisters on that one aspect of chapter life.

With a clear understanding of the requirements and duties of the office, and continuing support from their sisters, P.E.O.'s Local Chapter Officers are able to serve with confidence and competence. They are the strength of their chapters.



The following is a summary of the duties and responsibilities of Local Chapter Officers, with a brief survey of the resources available from International Chapter and New York State Chapter, and an estimate of the time commitment per month.

All Local Chapter Officers

Most of the duties and responsibilities for each office are found in Part III of the P.E.O. Constitution and in the Instructions to Officers of Local Chapters (IOLC). Both of these documents are available on the International website www.peointernational.org> Resource Library> Local Chapter Members> Manuals & Handbooks. There are additional duties for local chapter officers found in Article IX of the New York State Bylaws. This document is available on the NYS website www.peonewyork.org> Member Home> Publications.

Recommended training videos on the International website www.peointernational.org are available for President/Vice President, Recording Secretary, Corresponding Secretary and Treasurer. Each video takes about 20 minutes, and the script can be printed. Videos and scripts are found in the Resource Library> Local Chapter Officer Resources> Local Officer Training.

To-Do List for All Officers

- Attend the annual Officers' Transition and Goals Setting meeting to exchange supplies and receive instructions, and to chart the course for your chapter in the year ahead.
- Maintain the current instructions for your office.
- Be familiar with the Retention Record for your office, found in your section of the IOLC.
- Practice the Ceremony of Initiation with the newly-elected officers and before each initiation—even when using the official Initiation booklets.
- Attend meetings regularly. If you need to miss a meeting, it's your responsibility to arrange for a substitute to take your place. It's very important to let your President know you're not attending, and who is replacing you.



President

- Hold the Officers' Transition and Goal Setting meeting at the beginning of each P.E.O. year, to exchange supplies, for training, and to chart the course for your chapter in the year ahead.
- Appoint chapter committees as required in your local chapter bylaws.
- Schedule initiation practice with new officers. Learn the Special Work, if you don't know it, and make sure your Vice President knows it as well.
- Serve as a delegate to the New York State Convention in June, when feasible.
- Prepare for and conduct chapter meetings.
 - Help Vice President prepare to conduct a chapter meeting, showing her the President's Book and discussing each section.
 - Invite Vice President to conduct a chapter meeting at least once.
- Coordinate the work of all chapter officers and committee chairs.
- Monitor the Annual Report process January to March:
 - In January you'll receive the packet of your chapter's Treasurer and Corresponding Secretary Annual Report forms. Please distribute the Annual Report packets promptly, with the reminder that they must report identical tallies of your chapter's membership activity during the past P.E.O. year.
 - Stay in touch with your Treasurer and Corresponding Secretary as they prepare the reports, and resist the temptation to complete the reports before March 1.
 - Review the completed reports with your Treasurer and Corresponding Secretary before you and they sign the forms, verifying the information and proofreading. If you will be out of town, arrange for the Vice President to review and sign the reports.
 - The completed and signed reports are sent to the NYS Treasurer and NYS Secretary; those packets must be postmarked March 10 at the latest, or your chapter will be assessed a \$50.00 late fee.
 - When your officers receive the release letters, approving the reports, they will read the letters at the next business meeting
- Counsel prospective and new members.
- Write the annual President's letter. Suggestions for the President's Letter are listed in Article IX of the NYS Bylaws. Once read to and approved by your chapter in February, send the letter to the NYS President, either by email or hard copy.
- Become familiar with the President's responsibilities for the Ceremony of Initiation.

Time Commitment: At least 5 hours per month, with active and engaged committees and officers supporting her

Vice President

- Be very familiar with President's duties, including the Special Work. With the President, go through each section of the President's Book.
- Perform President's duties when necessary. It's a good idea to conduct a meeting at least once.
- Assume the presidency if necessary.
- Be familiar with the balloting instructions given in your section of the Instructions to Officers of Local Chapters (IOLC).
- Become familiar with the Vice President's responsibilities for the Ceremony of Initiation.
- Additional duties may be determined by the chapter.

Time Commitment: Less than 1 hour per month, but varies according to chapter responsibilities





Recording Secretary

- Record the minutes of each meeting. Once approved by the President, read them at the next meeting.
 - Templates for regular and social meeting minutes are on the International website www.peointernational.org > Resource Library< Local Chapter Officer Resources> Recording Secretary Forms.
- When the chapter bylaws and standing rules are amended, send them by email to the NYS Amendments and Recommendations (A&R) Committee Chairman—with highlighted changes—by March 10.
- If there are no changes to the chapter bylaws and standing rules, notify the NYS A&R Committee Chairman via email by March 10.
- Become familiar with the Recording Secretary’s responsibilities for the Ceremony of Initiation.

Time Commitment: 3-5 hours per month

Corresponding Secretary

- Conduct the correspondence of the chapter.
- Report to the chapter monthly using the “Corresponding Secretary’s Monthly Report to Chapter” form available at www.peointernational.org > Resource Library> Local Chapter Officer Resources> Corresponding Secretary Forms.
- Maintain the complete record of chapter membership.
 - Use the copy of your most recent Annual Report of Corresponding Secretary (ARCS) to record gains in membership during the ensuing year.
 - Use the current Chapter Membership Summary (CMS—comes in Annual Report Packet) to record decreases in membership during the ensuing year.
- Complete a Change in Membership (CIM) report online, in a timely manner (ASAP), for an initiation, reinstatement, transfer or death. Note: Inactives are reported on the ARCS only.

 The key to a smooth easy-peasy annual report process is to submit a CIM as soon as possible after an initiation, reinstatement, transfer or death. 

- New Chapter Eternal Instructions! Forms may be secured from the NYS Secretary or the NYS website www.peonewyork.org> Resources> Officer Resources/Forms > Corresponding Secretary > **NEW!** Chapter Eternal Instructions (*Updated 10/2017*).
- The Annual Report of the Corresponding Secretary (ARCS) will take extra time in February and March. PLEASE SEE THE ANNUAL REPORTS SECTION BELOW ON PAGE 7.
- Become familiar with the Corresponding Secretary’s responsibilities for the Ceremony of Initiation.
- If a new Corresponding Secretary was elected in March, please retain the Corresponding Secretary’s books and supplies until you receive your annual report release—approving your ARCS—and after you have submitted online these reports:
 - 1) Report of Election of Officers
 - 2) Delegates and Alternates to State Convention
 - 3) Local Chapter Report of Project Chairmen
 - 4) Nominee for Delegate to Convention of International Chapter, if applicable.

Then you may deliver your supplies and train your successor on the duties and responsibilities of the office.

Time Commitment: 1-2 hours per month + extra time in February and March.



Treasurer

- Keep a complete list of members and record attendance at each meeting.
- Report chapter assets monthly using the “Treasurer’s Monthly Report to Chapter” form available at www.peointernational.org> Resource Library> Local Chapter Officer Resources> Treasurer Forms.
- Receive and disburse chapter funds, and record all receipts and disbursements in the ledger.
- Balance the chapter checkbook each month.
- Send dues notice to all chapter members—residents and non-residents—generally in mid-January. Send second notices and continue to follow-up with phone calls and emails. Do not mark a member as “inactive” because you have had no response! Make every effort to directly contact each member.
- Collect annual dues in January and February.
- If your chapter membership includes snow birds, you might consider moving the entire dues process to the autumn months, before the snowbirds fly south.
- At the last meeting in February, read the names of those who have not yet paid their dues. It is possible for your chapter to advance dues for a member to maintain her active status.
- Issue Membership Cards when dues are paid.
- The Annual Reports of the Treasurer will take extra time in February and March. PLEASE SEE THE ANNUAL REPORTS SECTION BELOW ON PAGE 7.
- Become familiar with the Treasurer’s responsibilities for the Ceremony of Initiation.
- If a new Treasurer was elected in March, please retain the Treasurer’s books and supplies until you have received the notice of release—approving your Annual Dues Report—from the NYS Treasurer. Then you may deliver the supplies and train your successor on the duties and responsibilities of the office.

Time Commitment: 1-2 hours per month + extra time in February and March.

Chaplain

- Conduct the devotions at each meeting, using any version of the Bible which contains both Old and New Testaments and which is acceptable to the chapter.
- At each meeting lead the chapter in the P.E.O. Prayer and the Lord’s Prayer.
- If desired, provide an inspirational message under “Suggestions for the Good of the Chapter.”
- Become familiar with the Chaplain’s responsibilities for the Ceremony of Initiation.

Time Commitment: Less than 1 hour per month

Guard

- Take the password at meeting, close and guard the door. See the Chapter Meeting section in the President’s Book, Item #1: “Call to Order,” and Appendix #4 in the President’s Book: “Instructions for Taking Password.”
- Become familiar with the Guard’s responsibilities for initiation. See Appendix #21 in the President’s Book: “Guard’s Instructions for Initiation.”

Time Commitment: Less than 1 hour per month, but varies with special events as called by the President.



Membership Committee Chairman

While membership is the responsibility of each sister, the membership committee leads the way by providing membership activities that nurture and educate, and reaffirm the vows of our Sisterhood. Like a good architect, the membership committee chairman helps her chapter build a strong structure.

- Help your chapter determine membership goals.
- Have a Membership Report ready for each meeting, including the Hot Spot newsletter.
- Connect with all chapter sisters:
 - Encourage membership activities, including honoring membership anniversaries, small interest groups, socials, outings, etc. etc.
 - Stay in touch with non-resident members, nonparticipating members, inactive sisters and other Sisters in Transition. Encourage lateral transfers.
 - Work with your Reciprocity Unaffiliate Chairman, to learn about and contact unaffiliates in your area.
- Mentor and nurture new initiates, transfers, and reinstatements.
- Identify potential members through “Franc’s List,” socials, guest days, project recipients, etc.
 - Send and follow up on the form “Introduction of a Woman Not a P.E.O.”
- Online resources at www.peointernational.org> Membership> Membership Toolboxes> Membership Toolbox for Local Chapters> MEMbership Begins with ME!: A Guide for the Local Chapter Membership Committee.

Time Commitment: 1-2 hours per month

Technology Contact

Suggested Software/Hardware Requirements and Skill Set

- Access to the Internet and email.
 - Ability to become very familiar with International and NYS websites.
- Ability to check email regularly—checking email daily is best—and always just before a chapter meeting.
- Ability to access email when away from home, when possible.
- A working knowledge of computers that includes:
 - Ability to reply to, forward and print emails.
 - Ability to print pages, documents, files and forms from a website.
 - Ability to save files to retrieve later in MSWord or other document formats.
- Experience with social media and handling images.
- Be willing to serve for multiple years to establish continuity.

Duties

Remember that not all P.E.O.s are comfortable with technology. Help chapter members feel comfortable asking for technical assistance.

- Serve as a link to your chapter for communications from NYS and International officers.
- Determine how to convey information to sisters who don’t use email.
- Facilitate digital communication within your chapter, including sending meeting reminders to chapter members and sending meeting attendance estimates to hostesses and co-hostesses.
- Be the go-to person for those unable to access the Internet.



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- Report at each chapter meeting—and/or in newsletters—on activities conducted as chapter technology contact and new information found on the NYS and International websites.
 - Regularly review the International and NYS websites.
 - Access other s/p/d chapter websites periodically, and report on good ideas you find.
 - Present a brief Tech Tip or a mini-program.
 - Use your "eMagination" to discover and present other possibilities.
- Create and help maintain/update your chapter's page on the My P.E.O. Connect web page.
- Submit articles and pictures to mediamanager@peodsm.org for possible posting on the International Facebook page.
- Know the P.E.O. guidelines and policies for using Social Media for chapter purposes.
 - Guidelines at www.peointernational.org> Resource Library> Local Chapter Members> Brand Resource Center.
 - Policies in the Instructions to Officers of Local Chapters (IOLC).
- Make sure the chapter budget includes your printing and paper costs. Suggested amount: not less than the cost of one ream of paper and an ink cartridge annually.
- Additional Resources:
 - Each issue of *The Record* includes Tech Tips from the Digital Communication Specialist at P.E.O. International Headquarters.
 - International Headquarters has an IT Help Desk, available by phone: 515-255-3153

Time Commitment: Varies. 1-2 hours per month but requires daily attention in the week before a meeting or social event.



Nothing is more fundamental than the need for strong local chapters
for therein lies the strength of the P.E.O. Sisterhood.

Strong chapters are the result of good leadership.

Beth Ledbetter and Sue Baker
Leadership Education and Development (LEAD) 2010
Revised September 2015



Annual Reports of the Corresponding Secretary and Treasurer

One-Time Commitment to Complete Reports: 3 Hours

In February and early March, the Annual Reports process will require extra time from both the Corresponding Secretary and the Treasurer.

As the ARCS and the Treasurer's Annual Dues Report must report identical tallies of your chapter's membership activity, we highly recommend these two officers plan for a 3-hour meeting in early March—after all dues have been collected—to complete the process together.

The annual reports training videos—for both Corresponding Secretary and Treasurer—found on the International website are very helpful and highly recommended. Videos are clear, scripts are printable, and both are up to date (January 2017). See www.peointernational.org> Resource Library> Local Chapter Officer Resources> Local Officer Training:

- Corresponding Secretary: Instructions for Annual Reports Video
- Treasurer: Instructions for Annual Reports Video

★ Corresponding Secretary: Annual Reports:

- **Annual Report of the Corresponding Secretary (ARCS) and**
- **Online Reports to Headquarters**
- **ARCS:** The P.E.O. Executive Office will send the annual report packet after January 1 and your President will deliver it to you. Your packet will contain:
 - Annual Report Cover Letter and Instructions
 - Sample Chapter Membership Records
 - Chapter Membership Summary (CMS)
 - Annual Report of Corresponding Secretary (ARCS)
- Watch the training video “Corresponding Secretary: Instructions for Annual Reports” (Revised 1/17) found on the International website, and print the script.
- After all dues have been collected—in early March—meet with your chapter Treasurer to reconcile the number of dues-paying members with the number of members to be reported on the ARCS. You and the Treasurer must agree on your chapter's membership activity.
- When you and the Treasurer agree, complete the ARCS form appropriately, as instructed.
- Obtain the President's signature on the completed form. You and your President must sign all report forms.
- Send the completed and signed ARCS form to the NYS Secretary. The report packet must be postmarked by March 10 or your chapter will be assessed a \$50.00 late fee.
- You will receive the Annual Report Release from the NYS Secretary indicating approval of the ARCS. This letter should be read to the chapter, when you highlight the number of members who were initiated, transferred, reinstated or went inactive during the past year. It is important that all members understand the health of your chapter. The Annual Report Release must be retained for six years with your membership records.
- **Online Reports to Headquarters:** Before March 31—and after the chapter officers have been elected and installed—you must submit four annual reports on the International website:
 - 1) Report of Election of Officers
 - 2) Delegates and Alternates to State/Provincial/District Convention
 - 3) Local Chapter Report of Project Chairmen



- 4) Nominee for Delegate to Convention of International Chapter, if applicable.
- If a new Corresponding Secretary was elected in March, please retain the Corresponding Secretary's books and supplies until you receive your annual report release—approving your ARCS—and after you have submitted online the 4 reports listed above. Then you may deliver your supplies and train your successor on the duties and responsibilities of the office.

★ **Treasurer: Annual Reports:**

- **Annual Dues Report of Treasurer of Local Chapter and**
- **Annual Financial Summary of Treasurer of Local Chapter: IRS-LC**
- The P.E.O. Executive Office will send the annual report packet after January 1, and your President will deliver it to you. The Treasurer's Annual Report packet includes:
 - Annual Report Instructions – Treasurer of Local Chapter
 - 1 set of 4 carbonless sheets - Annual Dues Report of Treasurer of Local Chapter
 - IRS-LC Instructions
 - Sample – Excel Treasurer's Program "Treasurer's Monthly Report to Chapter"
 - Sample – Hand written distribution ledgers
 - 2 copies of the Annual Financial Summary of Treasurer of Local Chapter (IRS-LC)
- Watch the training video "Treasurer: Instructions for Annual Reports" (Revised 1/17) found on the International website, and print the script.
- After all dues have been collected—in early March—meet with your chapter Corresponding Secretary to reconcile the number of dues-paying members with the number of members to be reported on the ARCS.
- When your numbers agree, complete the Annual Report of Treasurer of Local Chapter form in triplicate. Dues and fees are submitted with this form. One check, for the total dues and applicable International and NYS fees, will be made payable to the NYS chapter.
- The Annual Financial Summary, IRS-LC, includes the Chapter Letter(s), City, State, IRS Tax identification number, and beginning balance, which will have been reported to the IRS the previous year. The form is designed to coordinate with the descriptions and totals in your ledger. One completed original is retained in your files for six years. The second completed original is mailed to the NYS Treasurer.
- Obtain the President's signature for all forms. You and your President must sign all annual report forms.
- All three copies of the Annual Report form, one original IRS-LC and the dues/fees check are sent to the NYS treasurer. The package must be postmarked by March 10 or your chapter will be assessed a \$50.00 late fee.
- When approved, the NYS Treasurer will sign and return two copies of the annual report to you. Read the report to the chapter with the next monthly report—this constitutes your release.
 - Give one copy to your chapter president for her files.
 - Keep the other copy in your files. The Annual Report of Treasurer is retained for six years.
- If a new Treasurer was elected in March, please retain the Treasurer's books and supplies until you have received the notice of release—approving your Annual Dues Report—from the NYS Treasurer. Then you may deliver the supplies and train your successor on the duties and responsibilities of the office.



S/P/D RESOURCES

★ Arizona State Chapter, Tech Contact Guidelines ★ British Columbia Provincial Chapter, Tech Contact Guidelines ★ California State Chapter, Local Officer Training Program ★ Indiana State Chapter, Local Chapter Officer Training and Orientation ★ Minnesota State Chapter, Tech Contact Guidelines ★ Montana State Chapter, Tech Contact Guidelines ★ Nebraska State Chapter, Tech Contact Guidelines ★ Ohio State Chapter, Local



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Chapter Officers Area Workshop ★ Oregon State Chapter, Tech Contact Guidelines ★ Pennsylvania State Chapter, Local Chapter Resource Materials ★ South Dakota State Chapter, Local Officer Training Sessions ★ Washington State Chapter, Chapter Committee Information ★