

Please find below a list of resources you may need to complete the OV Worksheet and to fulfill the duties of your office. Feel free to contact the State Officer visiting your chapter for the upcoming Official Visit if you have any questions.

We are here to help!

PRIMARY DUTIES OF THE PRESIDENT:

- Support and empower your chapter officers; ensure that the transition meeting occurs
- Oversee the preparation of the Annual Reports of the Treasurer and Corresponding Secretary
- Maintain supplies/records by looking in the IOLC to find record retention requirements and discarding anything not required
- Appoint committees – Use this as an opportunity to encourage and inspire your membership
- Lead discussion to set annual chapter goals. Guidelines for setting goals can be found on the Leadership Development Resources page at www.peointernational.org
- Preside at meetings of the chapter, calling special meetings of the chapter when needed
- Attend Reciprocity – You are there to report on transfers and to share good news from your chapter
- Attend Convention—serve as delegate to Convention of New York State Chapter when feasible
- Following a favorable membership ballot, appoint committee to counsel prospective member
- Practice the President’s part in the Ceremony of Initiation. Memorize the Special Work
- Conduct an exemplification of the Ceremony of Initiation at least once during the year
- In February, write a President’s Letter and read to the chapter before sending to the state president. Send copies to non-resident members. Keep all President letters for the life of the chapter
- Share all news from International and NYS Board with your chapter

KEY TOOLS FOR THE PRESIDENT:

1. The Constitution (most recent printing)

- Part III pertains to the local chapter, and it is helpful to be familiar with this part of the Constitution.
- President keeps three copies of the Constitution: one for her use, one to loan to other officers, and one to loan to a prospective new member.

2. NYS Chapter Convention Proceedings, Bylaws & Standing Rules, Policy Manual (most recent)

- Posted on the NYS website annually following NYS Convention, these documents contain minutes and agendas of convention, annual reports of all state officers and state committees, state budget, chapter support of International and NYS Projects and other useful information. Find these documents [at www.peonewyork.org](http://www.peonewyork.org) > Publications.

3. Instructions to Officers of Local Chapters (IOLC)

- Available at www.peointernational.org > Resource Library > Local Chapter Members > Manuals and Handbooks
- President should maintain a complete, up-to-date set of instructions for all offices
- Read at least the Policies and President’s section, which explains your responsibilities for supervision of officers, annual reports, balloting, initiation, and increase/decrease in membership
- Note retention records on first page of each officer’s instructions
- Be familiar with procedures for Transfers In and Transfers Out

4. International and NYS P.E.O. Websites (www.peointernational.org & www.peonewyork.org)

- www.peointernational.org, especially under Resource Library > Local Chapter Officers
 - Excellent training videos for officers under Local Officer Training
 - Annual Report training videos are under Annual Reports
 - *Outline of Yearly Meeting for Local Chapter Officers* under “President”
 - *P.E.O. Wish* is under President > Special Documents.
- www.peonewyork.org
 - Contact information for NYS Executive Board, Reciprocities and Committees resource materials, NYS publications and information on NYS projects
 - Join our mailing list under Member Home > Publications
- Check websites often for updates

5. The President’s Book

- Become familiar with the order of business to keep meetings efficient and brief
- Share President’s Book with the vice president so she can be familiar with procedures, especially balloting
- President & Vice President should know where the other keeps her supplies—just in case
- Current chapter bylaws and standing rules should be kept in the President’s Book

6. P.E.O. Counsel for Membership Booklet

- This booklet is a guide for conducting both pre-acceptance and post-initiation counseling, which are crucial for a new member. New members who are not properly counseled sometimes do not know what is expected of a member or do not fully understand the organization, its mission and that membership is a lifetime commitment.
- PowerPoint presentations are available on the International website: www.peointernational.org > Resource Library > Local Chapter Members > Local Chapter Membership Toolbox > New Members

7. Local Chapter Yearbook, Bylaws and Standing Rules

- NYS Yearbook Guidelines are available by logging in as a member to www.peonewyork.org > Local Chapters > Officers > Recording Secretary > NYS Resources > Yearbook Guidelines 22 - 23
- Please include contact information for your chapter’s Board Buddy

PRESIDENT’S SUPPLIES:

1. You are no longer required to keep specific quantities of supplies. Read reference materials online or print selected pages as desired. If preferred, paper copies are available from the P.E.O. Supply Department.
Exception: Please print IOLC in its entirety, placing it behind the IOLC tab in the President’s Book.
2. Chapter Charter
3. Ceremony of Initiation booklets – all seven copies are kept by the President
4. Local chapter president’s annual letters
5. Emblems of inactive members; a sister is considered inactive on March 1 of the year she stops paying dues. Please hold her emblem for three years, then return it to P.E.O. International.
6. List of Emblem Returns
7. Annual Report of Treasurer (six years)
8. Chapter IRS identification number
9. Envelope with USA Patriot Act Information
10. Letters from officers of NYS chapter should be retained through February 28 of that year
11. Completed *P.E.O. Wish* forms for all chapter members