



MARYLAND STATE CHAPTER P.E.O. SISTERHOOD
2024 SPRING WORKSHOP HANDOUT
CORRESPONDING SECRETARY

DUTIES

Outlined in the Constitution

- Conduct the correspondence of the chapter.
- To send Invitation to Membership.
- To deposit initiation fee with treasurer of chapter.
- To keep a complete record of the membership of the chapter.
- To report as required by International Chapter:
 - Each initiation, transfer, inactive, reinstatement, death, expulsion, change in name.
 - Names of president, corresponding secretary, and the treasurer immediately after election and each time name and/or address of one of said officers is changed;
 - Names of delegates and alternates to convention of the s/p/d (or International) chapter.
- To report the expulsion of a member or reinstatement of an expelled member to the president of International Chapter; and to the president of the s/p/d chapter.
- To report to the P.E.O. Executive Office the name and contact information of a member moving.
- To deliver to your successor all papers and supplies of the office.

Outlined in the Maryland State Chapter Bylaws

- Electronically submits elected officers, technology and membership chairs and convention delegates and alternates as required by International Chapter.
- Sends a hard copy of the chapter yearbook to the Maryland State secretary and either a hard or electronic copy to the other state board officers by September 15.
 - *Sending a hardcopy of their yearbooks to the 5 board members (current method) OR*
 - *Sending 1 hardcopy of their yearbook to the secretary and emailing a softcopy to the other 4 board members (NEW method)*
 - *Either way, the secretary receives a HARD COPY and the YEARBOOK Evaluation Form*
- Sends any bylaws the chapter is proposing for action at state chapter to chair of Amendments and Recommendations Committee by Dec. 15.

CHANGES THAT HAVE BEARING ON YOUR OFFICE

- The annual reporting is now electronic, and no packet is mailed.
- The annual report is comprised of the Membership Roster, the Dues Form, and the IRS-LC.
- A training video and reference guide are available at **Resources > Resource Library > Select Local Chapter Officers from the Audience Type Search box > Annual Reports**
 - Step 1: Treasurer completes the Membership Roster and Dues Form
 - Step 2: Corresponding Secretary does a Membership Review
 - Step 3: President Reviews and Approves the forms (to include the IRS-LC which the Treasurer has also prepared)

A best practice is to reach out to the next officer in the process to notify her when you have completed your step so they know to check their email. A group text message is one way to do this. Getting the officers responsible for the annual reports together in person at one location could also be helpful. Keep in mind that even if using one device for multiple officers, the officer who has completed her step must sign-out before the next officer can log-in to complete her step.

- The Chapter Membership Summary is now called the **Membership Roster**.
- The treasurer now reports a member is inactive as part of her annual report process.
- There is no longer an Annual Report of the Corresponding Secretary (ARCS)

RECENT CHANGES THAT HAVE BEARING ON YOUR OFFICE

The Change in Membership form (CIM) and the Address, Email and Phone Update have been merged into one streamlined form and is now called **Member Update**.

RESOURCES

All resources are by Member Login on the International website, *peointernational.org*

GENERAL – Reference the ALL OFFICERS GENERAL INFORMATION Handout

OFFICE-SPECIFIC – [Resource Library > Local Chapter Officers > Corresponding Secretary](#)

6 – IOLC Corresponding Secretary Section

April 2023

It is helpful to print this section and keep it with the Corresponding Secretary's materials, however, be aware that the IOLC is updated; so, check the website at least annually to ensure you have the latest information. This section is only 9 pages long and provides instructions on **Record Retention and other duties** associated with your office. It also **contains tables and flowcharts for membership activity giving you a roadmap for what to do**. (Note: the table and flowcharts are also available separately for ease of reference.)

Corresponding Secretary – Staying in Touch!

NOV 2022

There is a **PowerPoint presentation** available on the International website that will help you with your duties.

GUIDELINES FOR THE REGULAR MEETING

The Report of the Corresponding Secretary is always given at the first regular meeting of the month using the **Corresponding Secretary's Monthly Report to Chapter form**. The date on the report is the date of the chapter meeting.

Note: If there was nothing for you to report, say that *"No correspondence was sent"*.

Correspondence is addressed at every meeting. Some correspondence is circulated via email prior to the meeting, and some is read at the meeting. All correspondence should be identified by the date it was received, from who and the subject so it is recorded in the minutes.

If there is a notification of a member **transfer out**, be sure to **record the date it on the Membership Roster** (formerly Chapter Membership Summary) (see below under Maintaining Chapter Membership Records).

Member **correspondence related to either a reinstatement or an acceptance of invitation to transfer is read last** for the president to take the appropriate chapter action. Invitations to transfer are not accepted in the month of February.

Give the correspondence to the Recording Secretary for her accurate recording in the minutes. Make sure any correspondence that requires chapter action is returned to the president. **After the minutes reflect that the correspondence has been read**, the correspondence may be **destroyed**. Please do not keep unnecessary or old correspondence in your files. Items of historical significance may be given to your chapter historian.

Other **membership-related business** requiring your action may occur through membership committee reports, chapter business, suggestions for the good of the chapter, communications with chapter sisters or annual reporting. These are:

- Upon successful balloting on a name for membership, extending an **Invitation to Membership**
- Extending an **Invitation to Transfer** following chapter bylaw procedures.
- Reporting the **death** of a sister
- Reporting a **name change**
- Reporting a **change of address or contact information**.
- Notifying local chapter presidents and organizer in an S/P/D that a **sister has moved and is interested in a transfer**.
- Reporting a **change of address or contact information** for local chapter officers.
- Reporting on the **election of officers and delegates**

Remember to include that this information was reported in your Monthly Report of the Corresponding Secretary.

Page 2 of the Corresponding Secretary's portion of the IOLC has a chart that specifies what needs to be done for every type of membership activity – what action is to be taken, what form is to be used, where to send the form and what information should be confirmed before submitting the form.

Page 9 of the Corresponding Secretary's portion of the IOLC has a **Processes Flow Chart** which is helpful in completing membership tasks.

ELECTION OF OFFICERS and CHAPTER APPOINTMENTS

Immediately after the officers are installed in March, make the appropriate online entries for the **Report of Elections of Officers of Local Chapter**. You will include the chapter officers as well as the technology chair and the membership chair. When your chapter has its project chairs for the year, these are reported on **Local Chapter Report of Project Chair**. The **two delegates** and **two alternates** for the State Convention are entered in the last category. Each chapter **MUST submit two names for delegates and two names for alternates to the State Convention** using **State/Provincial/District Convention – Delegates and Alternates**.

When the chapter is eligible for a delegate to the **International Convention**, make the appropriate online entry to record the names of the nominees for delegate and alternate. The **local chapter nominates** the delegate and alternate to International Convention, but they are elected at the convention of the state chapter.

MAINTAINING CHAPTER MEMBERSHIP RECORDS

To keep a complete record of the membership of the chapter is key to your job as corresponding secretary. This is easy to accomplish if you stay on top of this throughout the year. Official membership records are maintained in

- **General Enrollment Book**, for chapters that were organized prior to March 1, 2010, it is no longer used to record membership. It is the only place that records members of the chapter who died before 1980. It is retained for the lifetime of the chapter.
- **Chapter Membership History (CMH)** replaces the use of the General Enrollment Book. It lists all women who have been a member of the chapter. This is kept for the lifetime of the chapter; however, you may request an updated copy of this history, but it is requested that this not be done more than every 5 years.
- **Membership Roster** – generated every year, it is sent to the chapter as part of the annual reporting for the corresponding secretary. It provides information on all living members (active and inactive) of the chapter and is used to record increases and decreases in membership in the ensuing year. (The *previous* year may be discarded once your annual report has been released.)

Remember that the Membership Roster which is generated each year, will only reflect the living members of your chapter so remember to make entries in your Chapter Membership History (e.g. initiates, death date, etc.) to keep a full record of the membership as you would have with the General Enrollment Book.

WHAT TO USE FOR A MEMBERSHIP ACTIVITY

Invitation to Membership

This is a formal invitation available from the P.E.O. Supply Dept. that you should always have in your corresponding secretary supplies. You should let your treasurer know if she needs to order some.

Invitation to Transfer

This is available online as a Fill & Print form.

Member Update Form (formerly Change in Membership (CIM) Form)

This online form is used to report **initiations, reinstatements, transfers, deaths, and any information about the member that changes** (name, address, email, etc.). You will receive email confirmation of the information you entered. Members may also change their own contact information which will result in a similar email to you. Note that all membership records are updated using the **Member ID** of the sister as a reference. For ease of use, a Lookup function is available on the form.

Notice of a Member in Your Area (formerly called Notice of a Member Moving)

This is an online form to report the name and address of a member residing in another city who is interested in a transfer. When submitted, it will automatically be sent to presidents of local chapters within a 30-mile radius of the woman's physical address, the organizers of the state, province or district (S/P/D) in which the woman resides, and any neighboring S/P/D within a 30-mile radius of her physical address. (If the woman resides in subordinate territory (Hawaii), a copy will be sent to the organizer of International Chapter.) Those receiving the form will be able to see the names and contact information of other form recipients in order to foster good communication and outreach collaboration.

Lateral Transfer Introduction

The lateral transfer provides a solution for the member who – for a variety of reasons – is now unable to attend business meetings of her chapter. A lateral 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.

CEREMONY OF INITIATION

- **In preparing for the Ceremony of Initiation, the Guard sets the mood for the ceremony.**
- To set the appropriate mood, **study the Guard’s Instructions for the Ceremony of Initiation** which is in the Guard’s supplies and is printed in full in the IOLC Guard section.
- **Physically practice** and become comfortable with all the materials and sequencing.
- The **Ceremony of Initiation** can be performed **in person** or **virtually** and **up to 3 women** can be initiated in one ceremony. Chapters should make use of the materials that have been developed to ensure they are able to conduct their ceremony smoothly and with comfort in this most special experience of P.E.O. sisterhood.
- **Resources > Resource Library > select Topic *Ceremony of Initiation***
- The **Ceremony of Initiation Period of Instruction** video provides instruction for the officers participating in the ceremony and the prompter prior to practicing an **in-person initiation**. (Note: it was developed prior to the virtual option being allowed.) It incorporates several of the options within the ceremony that are now available.
- A [Period of Instruction on the Ceremony of Initiation document](#). A link to this document is below the Period of Instructions video. It is very helpful to have on hand for practicing the ceremony and a great resource for all the guard’s “choreography” in the ceremony.
- The **Virtual Ceremony of Initiation** video provides instruction for the officers participating in the ceremony and the prompter prior to practicing for a **virtual initiation**. The virtual ceremony has technical guidelines that must be followed and should be understood by any chapter wishing to make use of this option.
- **The Prompter** at a practice and for the ceremony is key. The **Prompter’s Booklet** in the President’s Book provides **instructions for the ceremony for in-person, virtual and initiating up to 3 women in one ceremony**.
- At the chapter’s discretion, **the Ceremony of Initiation may be memorized or read** from the P.E.O. Ceremony of Initiation booklets as provided by International Chapter.
- **Dress for officers** is either all in white top, black slacks/skirt, black shoes or all in white to include shoes.
- **If one officer holds the booklet, all must hold the booklets.** The only **exception is the president** who may be without a booklet if she has memorized her part. No booklets are necessary if all have memorized their parts.
- When revealing the ribbons, **the vice president** places her booklet (if used) on the table and **is the only one touching the emblem**. (Not applicable in a virtual format.)

Practice alone, practice together, practice using all materials and simulating as much as possible what will occur on this special day.

ANNUAL REPORT

The Maryland State Chapter Secretary emails a mid-year membership report in the October timeframe for her to see what is currently reported in the membership portal so the chapter can review and update information to be current.

Helpful resources for looking ahead for annual reporting are in:

Resources > Resource Library > Select Local Chapter Officers from the Audience Type Search box > Annual Reports

P.E.O. Electronic Report Training - Video and
Local Chapter Annual Report Reference Guide - pdf file
IRS Worksheet

Feb 2023
Jan 2024
Oct 2023

It will be very useful to download and print the reference guide which has helpful tips for coordinating with the president and corresponding secretary in completing the annual reporting and the IRS worksheet which also contains guidance in completing that form.

The annual reporting is comprised of the Membership Roster (formerly called the Chapter Membership Summary), Local Chapter Dues Form and IRS-LC.

- After the treasurer completes her portion of the Membership Roster, compare the information with your records of membership activity during the past year, giving careful consideration to dates and addresses.
 - Correct any discrepancies and complete any missing information on the Membership Roster.
 - Members who on March 1 have been inactive for 25 years and have not been heard from within a reasonable number of years and/or whose whereabouts are unknown shall be reported as lost contact on the Membership Roster.
- When notice of release is received, read the annual report to the chapter with the next monthly report. One copy is filed by the president; the other copy is for the files of the corresponding secretary.
- Once notice of release is received, books and supplies may be transferred to the new corresponding secretary, if applicable.

Note: When doing the online Corresponding Secretary Review, remember to scroll down to the bottom of the page to review any notes the treasurer may have had for you.

If you find you are supplying lots of updates, review your chapter processes to encourage timely reporting (e.g. making sure you are membership status and contact changes).

The Annual Report of the chapter must be approved by the president by March 10th.

The Corresponding Secretary is not officially released from her office until she receives the **official letter of release**. This letter is read at the next meeting and is retained for six years.