



**INSTRUCTIONS to OFFICERS  
of  
LOCAL CHAPTERS  
of the  
P.E.O. Sisterhood**

**Modified for COVID-19**

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# INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) PRESIDENT

**Instructions may be downloaded from the P.E.O. International member website:**

**Address:** <https://members.peointernational.org>

**Username:** sisterhood

**Password:** seven (followed by the current year, e.g., seven2022)

## RETENTION RECORD

TYPE OF RECORD	RETENTION
<b>Retain or destroy material in accordance with this record.</b>	
Annual Report of Treasurer	Six years
Chapter Charter	Life of Chapter
Chapter IRS identification number (U.S. chapters only)	Life of chapter
Constitution (three copies)	Two years
Emblems of inactive members collected prior to 09/2021	If unable to return to inactive member, retain in president's files three years; if reinstatement is not requested within three years, return to P.E.O. emblem division
Initiation by Affirmation form signed by new member	Until Ceremony of Initiation performed for new member
List of Emblem Returns	Life of chapter
Local chapter president's annual letters (required for chapters in non-chartered territory; otherwise if letter required by s/p/d bylaws)	Life of chapter
Proceedings of Convention of s/p/d chapter	Current copy or per s/p/d chapter requirement
Scrapbooks and other chapter memorabilia	May be preserved by a chapter historian at discretion of the chapter in accordance with archival policy. Refer to Policies section of IOLC <a href="#">Archival Storage for Minutes and/or Historic Memorabilia</a> .
Sponsor for Membership forms complete with three signatures	Destroy after balloting is recorded in minutes and minutes are approved

<b>GENERAL INFORMATION</b>	
<ul style="list-style-type: none"> <li>• Study all instructions in the President’s Book.</li> </ul>	<b>President’s Book</b>
<ul style="list-style-type: none"> <li>• Study Part III of the Constitution, bylaws and standing rules of local, s/p/d, and International chapters.</li> </ul>	<b>Constitution, Bylaws &amp; Standing Rules</b>
<ul style="list-style-type: none"> <li>• Have available the required supplies for office as shown on List of Supplies for Officers of Local Chapters.</li> <li>• Supplies available on the P.E.O. International member website may be printed as needed. Exception: The president shall print the current version of the IOLC in its entirety and place behind the IOLC tab in the President’s Book.</li> </ul>	<b>Supplies of Office</b>
<ul style="list-style-type: none"> <li>• The Proceedings of Convention of International Chapter may be accessed on the P.E.O. International member website.</li> <li>• Printed copies of the proceedings are not required to be kept.</li> </ul>	<b>Proceedings of Convention of International Chapter</b>
<ul style="list-style-type: none"> <li>• Call special meetings of the chapter when needed. Refer to Appendix #2 of the President’s Book for a list of business that may be transacted in a special meeting.</li> </ul>	<b>Special Meetings</b>
<ul style="list-style-type: none"> <li>• The president may appoint an assistant for any officer, except for the office of president. The name of the assistant may be listed in the chapter yearbook. Only one officer is elected and installed. The vice president serves as the president’s assistant and presides when she is absent. If the president vacates her office, the vice president assumes the office. She is not installed.</li> <li>• Vacancy in office, except that of president, is filled by appointment made by the president and approved by vote of the chapter. (Constitution, Part III, ARTICLE IV, Sec. 5) The appointed officer is not installed.</li> </ul>	<b>Officer Assistants &amp; Vacancies</b>
<ul style="list-style-type: none"> <li>• Chapters are not required to have an official visit during a vacation period. A chapter unable to be visited after an advance notice of 30 days shall be required to pay the expenses of the s/p/d or International officer’s official visit at another time. Refer to Constitution, Part III, ARTICLE III, Sec. 5. Refer to the bylaws and standing rules of the s/p/d chapter for provision for housing and meals of the s/p/d officer at the time of the official visit or, if in non-chartered territory, refer to the Constitution, Part I, ARTICLE VIII, Sec. 4.</li> </ul>	<b>Official Visit of Chapter</b>
<ul style="list-style-type: none"> <li>• Arrange for current president’s and treasurer’s signatures on bank account(s). Only active members may be a signer on a chapter’s bank account(s).</li> <li>• Call for presentation of an annual budget and acceptance by chapter vote, if applicable.</li> <li>• Call for acceptance of the Auditing Committee’s annual report of the treasurer’s books by a vote of the chapter at a meeting in March or April.</li> </ul>	<b>Chapter Finances/Audit</b>
<ul style="list-style-type: none"> <li>• It is the chapter’s decision to recite the Lord’s Prayer at chapter meetings.</li> </ul>	<b>Lord’s Prayer</b>

<ul style="list-style-type: none"> <li>• Be responsible for the safekeeping of the following items in the President’s supplies: <ul style="list-style-type: none"> <li>○ President’s Book</li> <li>○ P.E.O. Ceremony of Initiation booklets</li> <li>○ IRS identification number (U.S. chapters only)</li> <li>○ Emblems of inactive and expelled members</li> <li>○ List of all emblems returned by members (inactives, expelled, deaths)</li> <li>○ Completed Initiation by Affirmation forms until Ceremony of Initiation is performed for member; if member transfers prior to ceremony, forward completed form to president of her new chapter.</li> <li>○ Chapter charter</li> <li>○ File of all annual chapter presidents’ letters (if letter is required by s/p/d chapter)</li> <li>○ All Sponsor for Membership forms. Refer to President’s section of IOLC <a href="#">Retention Record</a>.</li> <li>○ Annual Report of the Treasurer for the past six years, and any other records and materials that should be kept. Refer to President’s section of IOLC <a href="#">Retention Record</a>.</li> </ul> </li> </ul>	<p><b>Items to be Maintained</b></p>
<ul style="list-style-type: none"> <li>• Instructions to delegates to convention of s/p/d (or International) chapters are furnished prior to convention by the president of the s/p/d chapter or, if in non-chartered territory, by the organizer of International Chapter.</li> <li>• If the chapter is entitled to two delegates to convention of s/p/d chapter, the alternate first elected fills the first vacancy.</li> <li>• If required by s/p/d bylaws and standing rules, the convention report may be given during new business or after close of meeting. If the latter, the president makes announcement so it is recorded in the minutes.</li> </ul>	<p><b>Convention</b> (Constitution, Part I, ARTICLE II and ARTICLE III; Part II, ARTICLE III and ARTICLE IV)</p>

<p><b>SUPERVISION OF OFFICERS</b></p>	
<ul style="list-style-type: none"> <li>• Following election, call a meeting of the officers for instruction in their duties. (Constitution, Part III, ARTICLE V, Sec. 1)</li> <li>• Deliver to successor all books, papers and supplies at the expiration of term of office and train successor on the duties and responsibilities of the office.</li> <li>• Coordinate the work of all offices. Be thoroughly familiar with procedures, regulations and supplies of all officers.</li> <li>• Make certain all officers’ supplies are complete and a sufficient number of items, not available on the P.E.O. International member website, are on hand. Refer to current List of Supplies for Officers of Local Chapters.</li> </ul>	<p><b>Officer Transition / Supplies</b></p>

<b>ANNUAL REPORTS</b>	
<ul style="list-style-type: none"> <li>• Write an annual letter to an officer of the s/p/d chapter as required by the bylaws and standing rules of s/p/d chapter. In non-chartered territory, write a brief annual letter to the organizer of International Chapter informing her of the condition of the chapter. Annual letters shall be kept for the life of the chapter in the president’s supplies.</li> <li>• The annual letter shall be read as an item of new business, approved at a chapter meeting in February and sent before March 1.</li> </ul>	<b>Chapter President’s Annual Letter</b>
<ul style="list-style-type: none"> <li>• Upon receipt of annual reports, distribute all forms to the corresponding secretary and treasurer as designated.</li> <li>• Ask the corresponding secretary to read the names of inactive members to the chapter in February and verify information on inactive members.</li> <li>• Determine prior to March 1 potential need by member(s) for assistance with dues.</li> <li>• Review annual reports of the corresponding secretary and treasurer before signing and submitting the reports. The vice president may sign in the absence of the president.</li> </ul>	<b>Preparation</b>
<ul style="list-style-type: none"> <li>• Notify treasurer upon receipt of release of approved annual reports and provide a copy for her file.</li> <li>• Call for the reading of the approved annual reports by the corresponding secretary and treasurer with the first monthly reports following receipt of approved copies.</li> <li>• Keep a copy of the Annual Report of the Treasurer in the president’s supplies.</li> </ul>	<b>Approved Annual Reports</b>

<b>BALLOTING FOR MEMBERSHIP</b>	
<ul style="list-style-type: none"> <li>• Refer to Vice President’s section of IOLC <a href="#">Balloting Procedure</a> for detailed instructions on balloting.</li> <li>• If the vice president is attending virtually – the vice president has no official function during virtual balloting. The president will appoint an assistant to perform the vice president’s in-person duties during balloting. The videoconferencing platform must allow for confidential and contemporaneous balloting/polling/voting. Members joining by phone will send their ballots and votes to the president by email or text.</li> <li>• After the written ballots are counted by the president and recording secretary, the recording secretary will seal ballots in an envelope. Immediately after meeting, the recording secretary will destroy the written ballots. All ballots received from videoconferencing or telephone conference, including emails and texts, must be deleted.</li> <li>• Number of unfavorable votes on any ballot shall not be revealed.</li> </ul>	<b>Balloting Procedure</b>
<ul style="list-style-type: none"> <li>• When more than one name is to be balloted upon at the same meeting, president repeats the voting instructions provided within Procedure for Chapter Meeting Order of Business #13 in the President’s Book. For in-person or hybrid meetings, the vice president repeats the process for distributing and collecting ballots.</li> </ul>	<b>Balloting Upon More than One Name</b>

**INITIATION**  
**(Constitution, Part III Article VI)**

- Due to the COVID-19 pandemic emergency, the P.E.O. Ceremony of Initiation will not be performed until further notice by the Executive Board of International Chapter and is not included in this version of the *Instructions for Officers of Local Chapters* (Modified for COVID).

**INITIATION BY AFFIRMATION**  
**(President’s Book Procedure for Chapter Meetings Order of Business #6)**

- Immediately following a favorable ballot, the president shall appoint a committee to counsel with the prospective member, preferably from sponsors. The president serves as chair. Use the P.E.O. Counsel for Membership Booklet and the P.E.O. Preacceptance Counseling PowerPoint available on the P.E.O. International member website.
- See that the corresponding secretary sends the Invitation to Membership to the prospective member immediately following the favorable ballot. If the invitation is accepted, the candidate must affirm her belief in God in her acceptance letter. (Constitution, Part III, ARTICLE VI, Sec. 1)
- A copy of the brochure, A Guide for When You Are Invited, may be provided to the prospective member. Membership brochures are available on the P.E.O. International member website or from the P.E.O. Supply Department.
- Give the candidate an opportunity to read the Constitution before her Initiation by Affirmation.

**Preacceptance  
Actions**

- Direct treasurer to order a copy of the Constitution to be given to the initiate under Suggestions for the Good of the Chapter on her date of initiation.
  - If New Member Welcome Kit is ordered from the P.E.O. Supply Department, a Constitution is included.
- The candidate for Initiation by Affirmation is present at the beginning of the meeting. Prior to the meeting, give the candidate instructions about the procedures of Initiation by Affirmation. If there is to be balloting, explain the procedure to the candidate.
  - No changes shall be made of a member’s original signature in the President’s Book. If a change in name is made, it shall be recorded by the corresponding secretary in the chapter’s Chapter Membership Summary and submitted by the online Member Update form to the Membership Department. Refer to Corresponding Secretary’s section of IOLC [Member Update Information](#).
  - Date of Initiation by Affirmation is not recorded in the President’s Book.
- If Initiation by Affirmation is being conducted at an in-person meeting the Initiation by Affirmation form may be signed during the meeting. If the initiate is attending the meeting virtually, the president should send the Initiation by Affirmation form to the candidate prior to the meeting. The signed form may be returned to the president at the postinitiation counseling meeting.
- No photos may be taken of the Initiation by Affirmation Ceremony. Pictures may be taken after the close of the meeting.

**Initiation by  
Affirmation**



<ul style="list-style-type: none"> <li>• Direct treasurer to order an emblem for the new member. (Emblem must not be ordered until after Initiation by Affirmation.)</li> <li>• Appoint a committee for a postinitiation conference with the initiate. (The committee may be a standing committee.) Use the P.E.O. Counsel for Membership Booklet and Postinitiation Counseling PowerPoint. Share the private meaning of our letters and password at the meeting. The new member will also sign the President’s Book.             <ul style="list-style-type: none"> <li>○ The president should collect the signed Initiation by Affirmation form, if she has not already done so.</li> <li>○ The Initiation by Affirmation form is kept by the president until COVID-19 meeting restrictions are lifted and a Ceremony of Initiation may be performed for the new member.</li> </ul> </li> <li>• If the new member transfers prior to her Ceremony of Initiation, the president shall send the completed Initiation by Affirmation form to the member's new chapter.</li> <li>• After the Ceremony of Initiation has been performed for the new member, the Initiation by Affirmation form may be destroyed.</li> <li>• If an initiate is not in the geographic vicinity of the chapter for postinitiation counseling, the chapter president shall write the initiate(s) name in pencil in the President’s Book (in order of Initiation by Affirmation); this placeholder shall be kept until the member can sign the book.</li> <li>• Explain the fixed time for payment of dues and assessments and penalties for nonpayment. Dues are payable in advance. If initiation occurs in February, dues for the coming year must be paid prior to March 1; if initiation occurs in March or thereafter, dues are paid prior to March 1 of the <b>following</b> year. (Constitution, Part III, ARTICLE VIII)</li> </ul>	<p><b>Postinitiation by Affirmation</b></p>
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<p><b>INCREASE IN MEMBERSHIP – TRANSFERS IN</b></p>	
<ul style="list-style-type: none"> <li>• Be familiar with all requirements pertaining to transfers, with special reference to order of procedure for invitation to transfer and acceptance of transfer.             <ul style="list-style-type: none"> <li>○ An inactive member may accept a chapter’s invitation to transfer if she indicates in her acceptance that she is reinstating and includes her reinstatement fee of \$35.00.</li> </ul> </li> <li>• See that official forms are used and encourage promptness in reporting (e.g., the corresponding secretary submits the Member Update form online only).</li> <li>• An invitation to transfer may not be extended or accepted in February. An exception is made for an organizing or reorganizing chapter. (Constitution, Part III, ARTICLE X, Sec. 2)</li> <li>• A P.E.O. remains a member of her current chapter until the inviting chapter has accepted the transfer by reading her acceptance letter at a meeting.</li> <li>• Instruct the corresponding secretary to record on the Annual Report of Corresponding Secretary (ARCS) form the date the transfer was accepted.</li> </ul>	<p><b>Transfer In</b></p>

<b>DECREASE IN MEMBERSHIP</b>	
<ul style="list-style-type: none"> <li>Notification of member transferring into another chapter will be sent by the Membership Department upon receipt of the Member Update form from accepting chapter.</li> <li>Upon receipt of such notification from the Membership Department, the corresponding secretary shall make the appropriate entry on the Chapter Membership Summary (CMS). No other action is required by the “transferring out” chapter.</li> </ul>	<b>Transfer Out</b>
<ul style="list-style-type: none"> <li>A member is inactive when her dues are not paid before March 1.</li> <li>Direct corresponding secretary to make the appropriate entry on the Chapter Membership Summary and on the Annual Report of Corresponding Secretary, dated March 1.</li> </ul>	<b>Inactive</b>
<ul style="list-style-type: none"> <li>Upon death of member, direct corresponding secretary to make the appropriate entry on the Chapter Membership Summary and submit the online Member Update form to the Membership Department. Refer to President’s section of IOLC <a href="#">Emblems</a> for further instructions.</li> </ul>	<b>Death</b>

<b>EMBLEMS</b>	
<ul style="list-style-type: none"> <li>Refer to Treasurer’s section of IOLC <a href="#">Emblems</a> for instructions on replacing lost and/or exchanging emblems for active members.</li> </ul>	<b>Emblem Orders for Active Members</b>
<ul style="list-style-type: none"> <li>Refer to Treasurer’s section of IOLC <a href="#">Emblems</a> for instructions on ordering an emblem for reinstating members.</li> <li>If a reinstating member has lost her emblem, she shall pay the replacement cost. (Constitution, Part III, Article VII, Sec. 5).</li> <li>If a reinstating member’s emblem has previously been returned to the P.E.O. Emblem Division, the chapter she is reinstating into will purchase a new emblem. If the reinstating member is transferring from another chapter, contact her previous chapter as to whether the emblem is being held by the chapter or was returned to the P.E.O. Emblem Division.</li> </ul>	<b>Emblem Orders for Reinstating Member</b>
<ul style="list-style-type: none"> <li>Refer to P.E.O. Chapter Eternal Preferences form if completed by the member. Ascertain if the emblem was buried or cremated with the member or is being retained by her family. If not, secure the emblem and return it to the P.E.O. Emblem Division. It is recommended the pin(s) be returned in a padded envelope. Be very respectful when requesting the return of an emblem.</li> <li>Cremation is a form of burial. P.E.O. emblem may be enclosed with ashes in the cremation urn. If ashes are scattered and emblem is not being retained by her family, the emblem should be returned to the Emblem Division.</li> </ul>	<b>Emblem Disposition for Deceased Member</b> (Constitution, Part III, ARTICLE VII, Sec. 4)

<ul style="list-style-type: none"> <li>• Upon the death of a past president of a s/p/d chapter, ascertain if her recognition pin was buried or cremated with her. If not, secure the recognition pin and send it to the president of the s/p/d chapter. It is recommended the pin be returned in a padded envelope.</li> </ul>	<p><b>Emblem Disposition for Past President of a S/P/D Chapter</b></p>
<ul style="list-style-type: none"> <li>• Upon the death of a current or past president of International Chapter, secure the large emblem with a diamond in the upper point and send it to the executive director of the P.E.O. Sisterhood, 3700 Grand Avenue, Des Moines, IA 50312. It is recommended the pin be returned in a padded envelope via tracked delivery. Such emblem shall not be buried or cremated with her.</li> </ul>	<p><b>Emblem Disposition for Current or Past President of International Chapter</b></p>
<ul style="list-style-type: none"> <li>• Emblems returned to the chapter prior to 9/2021 shall either:             <ul style="list-style-type: none"> <li>○ Be returned to the inactive member; or</li> <li>○ Be held in the president’s supplies for three years from the March 1 date when the member became inactive and indicate return on list of emblem returns. If reinstatement is not requested by the end of three years, return the emblem with the Emblem Return form to the P.E.O. Emblem Division in the P.E.O. Executive Office. It is recommended the pin(s) be returned in a padded envelope.</li> <li>○ Gavel or other guard is not to be returned.</li> </ul> </li> </ul>	<p><b>Emblem Disposition for Inactive Member</b></p>

<p><b>EXPULSION AND/OR DISCIPLINARY ACTION</b></p>	
<ul style="list-style-type: none"> <li>• A local chapter with a situation involving expulsion (Constitution, Part III, ARTICLE IX, Sec. 3) or disciplinary action (Constitution, Part III, ARTICLE XII) shall contact the s/p/d chapter president. The s/p/d president will notify the president of International Chapter.</li> </ul>	<p><b>Expulsion and/or Disciplinary Action</b></p>

# INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) VICE PRESIDENT

**Instructions may be downloaded from the P.E.O. International member website:**

**Address:** <https://members.peointernational.org>

**Username:** sisterhood

**Password:** seven (followed by the current year, e.g., seven2022)

<b>GENERAL INFORMATION</b>	
<ul style="list-style-type: none"><li>• Study Part III of the Constitution, bylaws and standing rules of local, s/p/d and International chapters.</li></ul>	<b>Constitution, Bylaws &amp; Standing Rules</b>
<ul style="list-style-type: none"><li>• Deliver to successor all books, papers and supplies at the expiration of term of office and train successor on the duties and responsibilities of the office.</li></ul>	<b>Officer Transition</b>
<ul style="list-style-type: none"><li>• Be familiar with the duties of the president and perform her duties when necessary.</li><li>• Become president in the event the president vacates her office.</li></ul>	<b>Support to President</b>
<ul style="list-style-type: none"><li>• Carefully follow instructions from the president for a chapter meeting and balloting.</li><li>• Arrange with hostess for an appropriate container for balloting as needed.</li></ul>	<b>Chapter Meeting Responsibilities</b>

## BALLOTING FOR MEMBERSHIP

<ul style="list-style-type: none"><li>• If the vice president is attending an in-person meeting – the vice president distributes a ballot to each member and then collects the ballots; after all balloting is complete, undistributed ballots are placed on president’s table.</li><li>• If the vice president is attending virtually – the vice president has no official function during virtual balloting. The videoconferencing platform must allow for confidential and contemporaneous balloting/polling/voting. Members joining by phone will send their ballots and votes to the president by email or text.</li><li>• President reads instructions for balloting.</li><li>• If a member is visually or otherwise impaired, the president shall offer to assist her with voting.</li><li>• For in-person balloting – After all ballots have been collected or submitted, vice president presents container to the president and recording secretary. The president and recording secretary determine the vote.</li><li>• For virtual balloting – The president will receive the results of the polling from either the videoconferencing platform or the virtual meeting host. Polling results are only shared between the virtual meeting host and the president.</li><li>• If another ballot is to be taken, the president will repeat the balloting procedure.</li><li>• Ballots must be counted only if there are three or more con votes on the first ballot.</li></ul>	<p><b>Balloting Procedure</b></p>
<ul style="list-style-type: none"><li>• When more than one name is to be balloted upon at the same meeting, president repeats the voting instructions provided as order of business #13 of Chapter Procedure in the President’s Book.</li></ul>	<p><b>Balloting Upon More than One Name</b></p>

# INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) RECORDING SECRETARY

Instructions may be downloaded from the P.E.O. International member website:

**Address:** <https://members.peointernational.org>

**Username:** sisterhood

**Password:** seven (followed by the current year, e.g., seven2022)

## RETENTION RECORD

TYPE OF RECORD	RETENTION
<b>Retain or destroy material in accordance with this record.</b>	
Corresponding Secretary's Monthly Report to Chapter form	Destroy after report is recorded in minutes and minutes are approved
Instructions for Minutes, Recording Secretary's Record Book	Current
Minutes	Life of chapter Minutes of chapter must be kept in their original form for a minimum of 10 years  Upon vote of chapter, minutes older than 10 years may be preserved in any manner in accordance with archival policy. Refer to Policies section of IOLC <a href="#">Archival Storage for Minutes and/or Historic Memorabilia</a> .
Social Correspondence	Destroy after correspondence is recorded in minutes and minutes are approved
Treasurer's Monthly Report to Chapter form	Keep until end of fiscal year and give to Auditing Committee Destroy after audit report is recorded in minutes and minutes are approved
Worksheets or temporary minutes	May be destroyed after minutes are approved by the chapter

<b>GENERAL INFORMATION</b>	
<ul style="list-style-type: none"> <li>• Study all instructions in the President’s Book.</li> <li>• Retain or destroy material in accordance with instructions in the <a href="#">Retention Record</a>.</li> <li>• Read/review all papers not correspondence.</li> <li>• Correspondence received electronically and shared with all chapter members does not need to be read at a chapter meeting. It should be noted for inclusion in the minutes.</li> </ul>	<b>Basic Instructions</b>
<ul style="list-style-type: none"> <li>• Study Part III of the Constitution, bylaws and standing rules of local, s/p/d and International chapters.</li> </ul>	<b>Constitution, Bylaws &amp; Standing Rules</b>
<ul style="list-style-type: none"> <li>• Have available the required supplies for office as shown on List of Supplies for Officers of Local Chapters. Forms available on the P.E.O. International member website may be downloaded when needed.</li> </ul>	<b>Supplies of Office</b>
<ul style="list-style-type: none"> <li>• Deliver to successor all books, papers and supplies at the expiration of term of office and train successor on the duties and responsibilities of the office.</li> </ul>	<b>Officer Transition</b>
<ul style="list-style-type: none"> <li>• In the absence of the president and vice president, call the chapter meeting to order and act as the chair until a chair pro tem is elected, said chair to serve for that meeting only. (As reference, refer to <a href="#">Appendix 3</a> from the President’s Book)</li> </ul>	<b>Chapter Meeting – Absence of Pres &amp; Vice Pres</b>

<b>BYLAWS &amp; STANDING RULES</b>	
<ul style="list-style-type: none"> <li>• Copy annually (immediately after March 1) the local chapter bylaws and standing rules in the Recording Secretary’s Record Book. Include any amendments adopted during the past year following instructions in the front of the book.</li> </ul>	<b>Where to Maintain Copy</b>
<ul style="list-style-type: none"> <li>• If local chapter bylaws and standing rules have been amended since the previous March 1, the recording secretary shall send a copy as instructed by the s/p/d executive board. Chapters in non-chartered territory send a copy to the organizer of International Chapter. A second copy for the President’s Book is given to the president of the local chapter.             <ul style="list-style-type: none"> <li>○ If local chapter bylaws and standing rules were not amended since the previous March 1, the recording secretary will send notification of “No Change” as instructed by the s/p/d executive board. For chapters in non-chartered territory, notification indicating “No Change” shall be sent in March by the outgoing recording secretary to the organizer of International Chapter.</li> </ul> </li> </ul>	<b>Amended Bylaws &amp; Standing Rules</b>

<b>BALLOTING FOR MEMBERSHIP</b>	
<ul style="list-style-type: none"> <li>Refer to Vice President’s section of IOLC <a href="#">Balloting Procedure</a> for detailed instructions on balloting.</li> <li>After the written ballots are counted by the president and recording secretary, the recording secretary will seal ballots in an envelope. Immediately after meeting, the recording secretary will destroy the written ballots. All ballots received from videoconferencing or telephone conference, including emails and texts, must be deleted.</li> <li>Number of unfavorable votes on any ballot shall not be revealed.</li> </ul>	<b>Balloting Procedure</b>
<ul style="list-style-type: none"> <li>A name balloted upon favorably shall be included in the minutes of the meeting at which the vote is taken, together with names of sponsors and the date the name was proposed for membership.</li> </ul>	<b>Favorable Ballot</b>
<ul style="list-style-type: none"> <li>The number of unfavorable votes on any ballot shall not be disclosed.</li> <li>A name balloted upon unfavorably shall not be recorded in the minutes.</li> </ul>	<b>Unfavorable Ballot</b>

<b>MINUTES</b>	
<ul style="list-style-type: none"> <li>Refer to <a href="#">Instructions Recording Secretary’s Record Book</a>.</li> </ul>	<b>Instructions</b>
<ul style="list-style-type: none"> <li>Minutes of the local chapter shall not be distributed by postal service, email or fax except between the president, recording secretary and their pro tem.</li> </ul>	<b>Distribution</b>
<ul style="list-style-type: none"> <li>Remove minutes from Recording Secretary’s Record Book when notebook is filled and place in numerical or chronological order in large envelopes with date of minutes on each envelope.</li> </ul>	<b>Maintenance</b>
<ul style="list-style-type: none"> <li>Minutes shall be maintained in their original format for 10 years. This format includes electronic minutes with an electronic signature. A complete set of the chapter’s minutes shall be kept for the life of the chapter. Refer to <a href="#">P.E.O. Historical Collections Guidelines for Local Chapters</a>.</li> </ul>	<b>Format</b>



## **INSTRUCTIONS RECORDING SECRETARY'S RECORD BOOK**

### **(To be kept in front of Recording Secretary's Book)**

1. Minutes are required for regular and special meetings.
2. Chapter minutes are to be retained for the life of the chapter.
3. The outgoing recording secretary does the following after the installation of officers at the first meeting in March:
  - a. Record the approved minutes of the last meeting in February.
  - b. Preceding the minutes of the first meeting, record the bylaws and standing rules incorporating amendments adopted during the previous year.
    - This instruction is to be followed even if the bylaws and standing rules were not amended during the previous year.
    - During the year, amendments to the bylaws and standing rules are to be noted with date of adoption.
4. Minutes must be kept in their original form for a minimum of 10 years. Upon the vote of the chapter, minutes older than 10 years may be preserved in any manner in accordance with archival policy. See the Retention List and Policies section in Instructions to Officers of Local Chapters (IOLC).

## **INSTRUCTIONS FOR MINUTES REGULAR MEETING**

Minutes are the record of chapter meetings and should state clearly all items of business and disposition of same. First and last names should be recorded.

The recording secretary reads the minutes, her name, title and footnote before the president asks if there are corrections.

### **MEETINGS** (regular, special)

- Include date, hour and place/format.
- Minutes of chapter meeting in which the organizer or her proxy makes an official visit may state: “The Procedure for P.E.O. Chapter Meeting (and the Ceremony of Initiation) was (were) exemplified for the visiting officer.”
- Minutes of a no-quorum meeting should state: “The regular meeting of Chapter \_\_\_\_\_ scheduled for (date) at (hour) at (place/venue) was not held because of the lack of a quorum due to (reason).”
- Minutes for a meeting cancelled due to emergency should state: “The regular meeting of Chapter \_\_\_\_\_ scheduled for (date) at (hour) at (place/venue) was not held due to (state emergency).”

### **CALL TO ORDER**

- If pro tem officers, statement is made: “By general consent, (name) served as (office) for the meeting.”

### **OPENING ODE / OBJECTS AND AIMS / DEVOTIONS / FORMAL OPENING OF MEETING**

- The above four items may be stated: “The meeting was opened in due form by the president.”

### **READING OF MINUTES**

- Minutes of last regular meeting, read and approved (or corrected and approved).
- Minutes of special meetings are read at this time.
- Minutes for each meeting are approved separately.

### **INITIATION**

- State name of new member(s).

## REPORT OF TREASURER

1. **Roll Call** – “(Number) responded.” If members arrived late, “(Number) responded and (number) came in after the roll was called.” If a member is accepted by transfer, at the meeting when her letter of acceptance is read, record, “(Number) members responded to roll call and one member was later accepted by transfer.”

List visitors who were introduced.

### 2. Financial Report

- a. Copy summary only of treasurer’s monthly report (Total Receipts, Total Disbursements, Total Chapter Assets).
  - b. Keep report for Auditing Committee.
  - c. Destroy after the Auditing Committee’s report has been accepted by the chapter and minutes recording such action have been approved.
3. **Bills** – Bills presented and allowed. Give name of member making motion; list bills. If none presented, no record made.

## REPORT OF CORRESPONDING SECRETARY AND READING OF CORRESPONDENCE

- **Correspondence Sent:** Record the recipient(s) and subject(s) of correspondence sent. Keep report until minutes recording the report have been approved.
- **Correspondence Received:** Record name of writer of each letter and brief statement of subject matter. Keep correspondence until the minutes recording the correspondence have been approved. Letters received for changes in membership should be recorded as the last item(s):
  - **Member transferring out:** “A notice of transfer out received from the P.E.O. Executive Office was read showing the acceptance on (date) of (name) into Chapter \_\_\_\_\_, (State/Province/District) of \_\_\_\_\_.”
  - **Member transferring in:** “A letter of acceptance for transfer in of (name) from Chapter \_\_\_\_\_, (State/Province/District) of \_\_\_\_\_ was read.”
  - **Member reinstating:** “A notification letter of reinstatement from \_\_\_\_\_ was read.”
  - **Member reinstating and transferring in:** “A notification letter of reinstatement and acceptance for transfer in of (name) from Chapter \_\_\_\_\_, (State/Province/District) of \_\_\_\_\_ was read.”

## CHAPTER BUSINESS

- Record each action; state all items of business and disposition of same. Name maker of motion, but do not record the name of seconder.
  - a. Committees
  - b. Unfinished business
  - c. New business

## **PRESENTATION OF NAMES FOR MEMBERSHIP**

- Record membership orders of business as follows:
  - **Signing of Sponsor for Membership Form** – If name does not receive three sponsors: “A name was presented for membership.” If name does not receive three sponsors at next regular meeting, no further record is made.
  - **Proposals for Membership** – If name receives three sponsors: “A name was proposed for membership.”
  - **Balloting** – If balloting is favorable: “The name of \_\_\_\_\_, proposed (date), sponsored by (list three names), was balloted upon favorably.” If ballot is unfavorable: “A name was balloted upon unfavorably.”

## **ELECTION AND INSTALLATION**

- Record names of members elected and installed.

## **REMARKS BY VISITORS**

- Record names, chapters and greetings.

## **SUGGESTIONS FOR THE GOOD OF THE CHAPTER**

- Record any given.

## **CLOSING / ADJOURNMENT**

- These two items may be stated: “The meeting was closed in due form by the president.”
- Signature, with title: “Secretary” (or, “Secretary Pro Tem”). DO NOT state: “Respectfully submitted.”
- When approved, write: “Approved” with date opposite signature. Program or social hour is added as a footnote.

# INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) CORRESPONDING SECRETARY

**Instructions may be downloaded from the P.E.O. International member website:**

**Address:** <https://members.peointernational.org>

**Username:** sisterhood

**Password:** seven (followed by the current year, e.g., seven2022)

## RETENTION RECORD

TYPE OF RECORD	RETENTION
<b>Retain or destroy material in accordance with this record.</b>	
Annual Release Letter	Six years
Chapter Membership History (CMH)	Life of chapter – Updated copy may be obtained from the Membership Department.
Chapter Membership Summary (CMS)	Current year; retain previous year CMS until release for annual report is received.
Correspondence from officers of s/p/d chapters	Give to appropriate local chapter officer.
General Enrollment Book (for chapters organized prior to March 1, 2010)	Life of chapter
Social correspondence	Destroy after correspondence is recorded in minutes and minutes are approved.

## FORMS & PROCESS FOR MEMBERSHIP ACTIVITY

<b>Member Activity</b>	<b>Action</b>	<b>Forms</b>	<b>Send</b>	<b>Double Check</b>
<b>Initiation</b>	Record information on Annual Report of Corresponding Secretary form  Record Member ID # received from Membership Dept.	Annual Report of Corresponding Secretary  Member Update	Submit online Member Update form to Membership Dept.	Member information including correct email & mailing addresses  Proper recording of the Member ID #
<b>Transfer In</b>	Record information on Annual Report of Corresponding Secretary form	Annual Report of Corresponding Secretary  Member Update	Submit online Member Update form to Membership Dept.	Member ID # (via P.E.O. International member website)  Date of transfer in
<b>Transfer Out</b>	Record information on Chapter Membership Summary	Chapter Membership Summary	N/A (notice sent to chapter from Membership Dept.)	Date of transfer out
<b>Reinstatement</b>	Record information on Annual Report of Corresponding Secretary form	Annual Report of Corresponding Secretary  Member Update	Submit online Member Update form to Membership Dept.	Member ID # (via P.E.O. International member website or as listed on Chapter Membership Summary)  Date of reinstatement
<b>Death</b>	Record information on Chapter Membership Summary	Chapter Membership Summary  Member Update	Submit online Member Update form to Membership Dept.	Member ID # (as listed on Chapter Membership Summary)  Date of death
<b>Member Becomes Inactive  (send with annual report)</b>	Record information on Chapter Membership Summary  Record year only  Record information on the Annual Report of Corresponding Secretary	Chapter Membership Summary  Annual Report of Corresponding Secretary	Annual Report of Corresponding Secretary to person designated on Annual Report cover letter (only submitted at annual report time)	Treasurer's record of dues not paid
<b>Name Change</b>	Record information on Chapter Membership Summary	Chapter Membership Summary  Member Update	Submit online Member Update form to Membership Dept.	Member ID # as listed on Chapter Membership Summary
<b>Notice of Member in Your Area</b>	Record information on Notice of Member In Your Area form	Notice of Member in Your Area  Member Update	Submit online Notice of Member in Your Area  Submit online Member Update form to Membership with change of address	Member's contact information
<b>Election of Officers</b>	Complete Report of Election of Officers of Local Chapters	Report of Election of Officers of Local Chapters	N/A  Online entry only	Officer's contact information
<b>Change of Address for Officers</b>	Record information on Report of Election of Officers of Local Chapters	Report of Election of Officers of Local Chapters	N/A  Online entry only	Officer's new contact information
<b>Change of Address  (mail and email)</b>	Complete Member Update form or confirm that member is reporting the change	Member Update	Submit online Member Update form to Membership Dept.	Member information including correct email & mailing addresses

<b>GENERAL INFORMATION</b>	
<ul style="list-style-type: none"> <li>• Study Part III of the Constitution, bylaws and standing rules of local, s/p/d, and International chapters.</li> </ul>	<b>Constitution, Bylaws &amp; Standing Rules</b>
<ul style="list-style-type: none"> <li>• After release of annual report is received, deliver to successor all books, papers and supplies at the expiration of term of office and train successor on the duties and responsibilities of the office.</li> </ul>	<b>Officer Transition</b>
<ul style="list-style-type: none"> <li>• Keep on hand at all times the required supplies for office as shown on List of Supplies for Officers of Local Chapters.</li> <li>• Download official forms for office from the P.E.O. International member website, as needed, to ensure the most recent form is used.</li> </ul>	<b>Supplies of Office</b>
<ul style="list-style-type: none"> <li>• Refer to the P.E.O. International member website Directory of Presidents for name, address, phone number (and email address when available) of presidents of local chapters, s/p/d chapter officers and past presidents of s/p/d and International chapters.</li> <li>• Conduct the correspondence of the chapter.</li> <li>• Maintain updated membership records on Chapter Membership Summary (CMS) and Annual Report of Corresponding Secretary. Submit online Member Update form for all changes to Membership Department.               <ul style="list-style-type: none"> <li>○ Refer to Forms &amp; Process for Membership Activity table provided on page 2 for details about forms and processes to be used.</li> </ul> </li> </ul>	<b>Duties</b>
<ul style="list-style-type: none"> <li>• Report to the chapter at the first meeting each month using Corresponding Secretary's Monthly Report to Chapter form or by indicating that no correspondence was sent.</li> <li>• The date on the report is the date of the chapter meeting. The report indicates correspondence sent during the month and should state names to whom letters were written and the subject matter of each letter.               <ul style="list-style-type: none"> <li>○ The report is filed with the recording secretary and copied in full in the minutes.</li> </ul> </li> <li>• Read/review correspondence received at each chapter meeting. Correspondence received electronically and shared with all chapter members does not need to be read at a chapter meeting. It should be noted under correspondence for inclusion in the minutes.</li> </ul>	<b>Reports Given at Chapter Meetings</b>

<b>CHAPTER MEMBERSHIP</b>	
<ul style="list-style-type: none"> <li>• As of March 1, 2010, each chapter’s General Enrollment Book was replaced with a Chapter Membership History (CMH). Keep the CMH for the life of chapter.               <ul style="list-style-type: none"> <li>○ The CMH lists all P.E.O.s who have been a member of your chapter, except those who were deceased prior to 1980. Information about members who were deceased prior to 1980 may be found in the retired General Enrollment Book.</li> <li>○ An updated copy of the complete CMH is available from the Membership Department upon request by the local chapter president. It is recommended that requests for updated copies of the CMH not be made in increments less than five years.</li> <li>○ Chapters organized before March 1, 2010, shall keep their General Enrollment Book for the life of the chapter.</li> </ul> </li> <li>• An updated copy of the Chapter Membership Summary (CMS) will be sent each year to the corresponding secretary with the annual report. This report represents all members who were living during the previous fiscal year, including those who died or moved during the year, and shall be used as follows:               <ul style="list-style-type: none"> <li>○ As reference document for the Annual Report of Corresponding Secretary (ARCS).</li> <li>○ To record decreases in membership during the ensuing year.</li> </ul> </li> </ul>	<b>Records / Reports</b>
<ul style="list-style-type: none"> <li>• A Member ID # is assigned by the Membership Department for each P.E.O. and is to be used for all membership records.               <ul style="list-style-type: none"> <li>○ Refer to IOLC section <a href="#">Glossary of Terms and Abbreviations</a> for Member ID # guidelines.</li> </ul> </li> </ul>	<b>Member ID #</b>
<b>INCREASE IN MEMBERSHIP</b>	
<ul style="list-style-type: none"> <li>• Submit the online Member Update form for all members received by initiation immediately to the Membership Department. Leave the Member ID # blank when completing the Member Update form to report an initiation.</li> <li>• Enter name of all members who have been initiated by affirmation on the Annual Report of Corresponding Secretary (ARCS) exactly as it is to appear on all P.E.O. records. Check with the member for correct entry.</li> <li>• An initiate will receive The P.E.O. Record and her Member ID # will be assigned <b>after</b> the online Member Update form has been received and recorded by the Membership Department.</li> <li>• It is important for the corresponding secretary to get an initiate’s information reported on the online Member Update form to the Membership Department immediately after initiation. The order for the initiate’s emblem, submitted by your chapter’s treasurer, will not be processed by the P.E.O. Executive Office until the Member Update form has been received.</li> </ul>	<b>Initiation by Affirmation</b>



<ul style="list-style-type: none"> <li>• Enter on Annual Report of Corresponding Secretary (ARCS) the name and Member ID # of a member received by transfer. Verify information with member.</li> <li>• Submit the online Member Update form for members received by transfer to the Membership Department.</li> <li>• Member’s official Member ID # is entered on the Annual Report of Corresponding Secretary (ARCS) and noted on the online Member Update form submitted to the Membership Department.</li> <li>• Date of acceptance of the transfer is the date of the regular or special meeting at which the acceptance letter is read.</li> <li>• If the acceptance letter is not received and read at a meeting before February 1, the member must pay her dues to her current chapter. An invitation to transfer may not be extended or accepted in February. An exception is made for an organizing or reorganizing chapter. (Constitution, Part III, ARTICLE X, Sec. 2)</li> <li>• In the case of a transferring member from a disbanded chapter, refer to the Constitution for procedure. (Part III, ARTICLE X, Sec. 2)</li> <li>• If a member is received by transfer and another by initiation at the same meeting, record the name of the initiate first in the Chapter Membership Summary.</li> </ul>	<p><b>Transfer In</b></p>
<ul style="list-style-type: none"> <li>• Record date of reinstatement on the Annual Report of Corresponding Secretary (ARCS). <ul style="list-style-type: none"> <li>○ A member’s reinstatement date is the date upon which her reinstatement letter and fee have been received by the chapter.</li> <li>○ If reinstating member is also transferring in, refer to the Constitution for the procedure. (Part III, ARTICLE X, Sec. 4) Reinstatement fee must be included with her acceptance letter.</li> </ul> </li> <li>• Submit the online Member Update form for all members reinstated to the Membership Department. Refer to Treasurer’s section of IOLC <a href="#">Annual Dues</a> information.</li> <li>• Following reinstatement, a member, regardless of how many years she has been inactive, may be honored as a 50-year member upon reaching the anniversary of her initiation.</li> </ul>	<p><b>Reinstatement</b></p>

<p><b>DECREASE IN MEMBERSHIP</b></p>	
<ul style="list-style-type: none"> <li>• When notification of a member’s transfer to another chapter is received from the Membership Department, read the notification letter to the chapter. No action is taken. The notification letter only informs that another chapter has accepted the member.</li> <li>• Make appropriate entries in the Chapter Membership Summary. <ul style="list-style-type: none"> <li>○ Date of transfer is specified in the notification letter.</li> </ul> </li> </ul>	<p><b>Transfer Out</b></p>

<ul style="list-style-type: none"> <li>Record whether member is Active or Inactive beside date of death in the Chapter Membership Summary.</li> <li>Submit the online Member Update form to the Membership Department.</li> <li>Refer to the bylaws and standing rules of your s/p/d chapter for any additional reporting requirements.</li> </ul>	<b>Death</b>
<ul style="list-style-type: none"> <li>Make appropriate entries on the new Annual Report of Corresponding Secretary (ARCS) form. Inactive members are reported only after March 1.</li> <li>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 LC (lost contact) on the Annual Report of Corresponding Secretary (ARCS). Refer to Corresponding Secretary's section of IOLC <a href="#">Annual Reports</a> instructions.</li> </ul>	<b>Inactive</b>

<b>MEMBER UPDATE INFORMATION</b>	
<ul style="list-style-type: none"> <li>No changes in the original signature of a member shall be made in the President's Book.</li> <li>Changes in name are recorded in the Chapter Membership Summary as follows: <ul style="list-style-type: none"> <li>Hyphenate only if the member wishes to use two surnames.</li> <li>If member changes name after initiation, draw a line through the name being dropped and add the name being assumed. Make this entry in ink.</li> </ul> </li> <li>Submit the online Member Update form to the Membership Department.</li> </ul>	<b>Change of Name</b>
<ul style="list-style-type: none"> <li>Multiple options are available for submitting a member's change of address: <ul style="list-style-type: none"> <li>Corresponding secretary may complete the online Member Update form to submit a member's change of address (mailing and email) for both active and inactive members. (This is the recommended method to ensure expediency of notification.)</li> <li>A member may submit her own change of address to the Membership Department by using any one of these three methods: <ul style="list-style-type: none"> <li>Completing the online Member Update form.</li> <li>Mailing or faxing the completed form available on the back cover of each issue of The P.E.O. Record.</li> <li>Calling 1-800-343-4921. (Automated line available 24 hours a day. May not be available in all areas of Canada.)</li> </ul> </li> </ul> </li> </ul>	<b>Change of Address</b> (mailing and email)
<ul style="list-style-type: none"> <li>Report the name and address of a member moving to or already living in another city by completing the online Notice of Member in Your Area form. If a member is moving to a city in non-chartered territory with no chapter or to a foreign country, send the Notice of Member in Your Area form to the P.E.O. Executive Office, 3700 Grand Avenue, Des Moines, IA 50312.</li> </ul>	<b>Notice of Member</b> <b>in Your Area</b>

<b>ELECTIONS</b>	
<ul style="list-style-type: none"> <li>• Immediately after installation of officers in March (Constitution, Part III, ARTICLE IV, Sec. 1) make the appropriate online entries for the Report of Election of Officers of Local Chapter.</li> <li>• To enter appropriate information, go to the P.E.O. International member website under the Resource Library, Local Chapter Officers, Corresponding Secretary, Report of Election of Officers of Local Chapters.</li> </ul>	<b>Report of Election of Officers</b>
<ul style="list-style-type: none"> <li>• Immediately after election, make the appropriate online entries to report the name(s) of delegate(s) and alternate(s) elected to convention of s/p/d chapter.</li> <li>• To enter appropriate information, go to the P.E.O. International member website under the Resource Library, Local Chapter Officers, Corresponding Secretary, Delegates to Convention (select one or two delegates).</li> </ul>	<b>Delegate to Convention</b> (s/p/d conventions)
<ul style="list-style-type: none"> <li>• Immediately after chapter project chairs are appointed by the chapter president, make the appropriate online entries to report the name(s) of the project chairs for the P.E.O. Educational Loan Fund, P.E.O. International Peace Scholarship Fund, P.E.O. Program for Continuing Education, P.E.O. Scholar Awards, P.E.O. STAR Scholarship and Cottey College.</li> <li>• To enter appropriate information, go to the P.E.O. International member website under the Resource Library, Local Chapter Officers, Corresponding Secretary, Local Chapter Report of Project Chairs.</li> </ul>	<b>Local Chapter Report of Project Chair</b>
<ul style="list-style-type: none"> <li>• In a year when the chapter is eligible for a delegate to Convention of International Chapter, make the appropriate online entries to report the names of nominees for delegate and alternate.</li> <li>• To enter appropriate information, go to the P.E.O. International member website under the Resource Library, Local Chapter Officers, Corresponding Secretary, Nominee for Delegate to Convention of International Chapter. <ul style="list-style-type: none"> <li>○ The local chapter nominates the delegate and alternate to Convention of International Chapter. They are elected at the convention of s/p/d chapter. Delegate and alternate for an eligible chapter in non-chartered territory are elected by their local chapter.</li> </ul> </li> </ul>	<b>Nominee for Delegate to Convention of International Chapter</b> (odd-numbered years for eligible chapters)

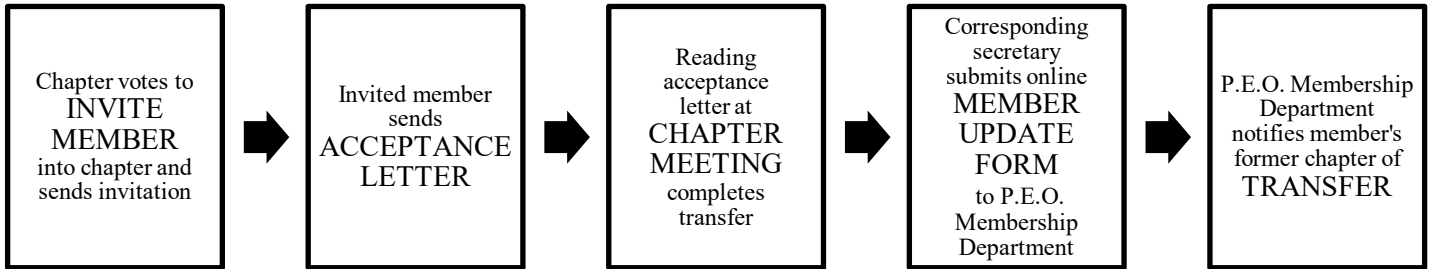
<b>ANNUAL REPORTS</b>	
<ul style="list-style-type: none"> <li>• Compare the information designated on the updated Chapter Membership Summary sent in the annual report packet from the P.E.O. Executive Office with your records of membership activity during the past year (refer to previous Chapter Membership Summary for decreases in membership during the past year and previous Annual Report of Corresponding Secretary [ARCS] for increases in membership during the past year).               <ul style="list-style-type: none"> <li>○ Note any discrepancies on the new Annual Report of Corresponding Secretary (ARCS).</li> </ul> </li> <li>• Make appropriate entries on the new ARCS form for members who became inactive on March 1.</li> <li>• 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 LC (lost contact) on the new ARCS.</li> <li>• Send the original and one copy of the completed and signed ARCS to the person designated on Annual Report cover letter on or before March 10 and maintain one copy for your files.</li> </ul>	<b>Annual Report of Corresponding Secretary</b>
<ul style="list-style-type: none"> <li>• Record an increase in membership during the ensuing year on the Annual Report of Corresponding Secretary (ARCS) by adding the appropriate information for an initiate by affirmation, transfer in or reinstatement.</li> <li>• Record a decrease in membership during the ensuing year on the Chapter Membership Summary by making appropriate notations for a transfer out or a death.</li> </ul>	<b>Use of Membership Reports During Ensuing Year</b>

<b>ANNUAL REPORT TIMELINE</b>	
<ul style="list-style-type: none"> <li>• Annual report forms and instructions sent to chapter president. Check with president to receive annual report materials.</li> </ul>	<b>January</b>
<ul style="list-style-type: none"> <li>• Read names of inactive members to the chapter to confirm contact information.</li> </ul>	<b>February</b>
<ul style="list-style-type: none"> <li>• Submit completed Annual Report of Corresponding Secretary (ARCS) to person designated on cover letter.</li> </ul>	<b>March 10</b>

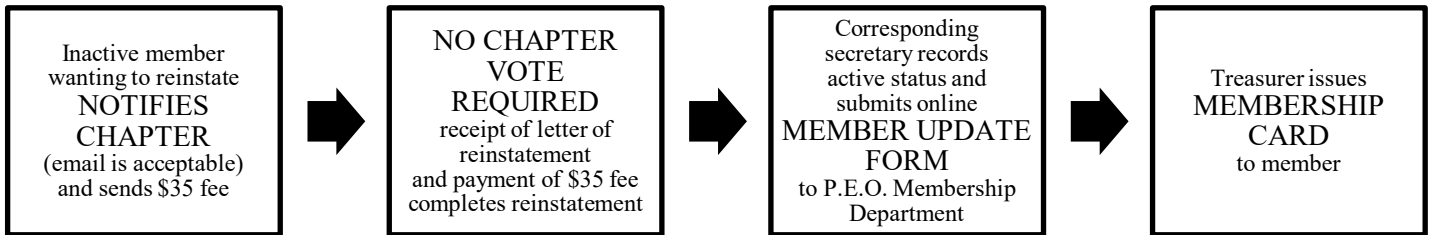
<ul style="list-style-type: none"> <li>• Read the Annual Release Letter to the chapter with the next monthly report.</li> <li>• Transfer books and supplies to newly installed corresponding secretary.</li> <li>• Annual Report of Corresponding Secretary (ARCS) is used during ensuing year to record increases in membership by adding the appropriate information for initiates by affirmation, transfers in or reinstatements.</li> <li>• Updated Chapter Membership Summary (CMS) provided with the annual report packet shall be used during the ensuing year to record decreases in membership (e.g., transfers out, deaths, inactives).             <ul style="list-style-type: none"> <li>○ Previous CMS used for membership activity during the past year may be destroyed.</li> </ul> </li> </ul>	<p><b>Upon Receipt of Release</b></p>
<ul style="list-style-type: none"> <li>• The Annual Release Letter will be mailed to the corresponding secretary, indicating the reported membership totals are in agreement with the official records of International Chapter.</li> <li>• Annual Release Letter is to be retained for six years.</li> <li>• Chapter Membership Summary (CMS) for the current year shall be used to record decreases in membership.             <ul style="list-style-type: none"> <li>○ CMS for the previous year must be kept until the release is received.</li> </ul> </li> </ul>	<p><b>Retention Requirements</b></p>

# TRANSFER AND REINSTATEMENT PROCESSES FLOW CHARTS

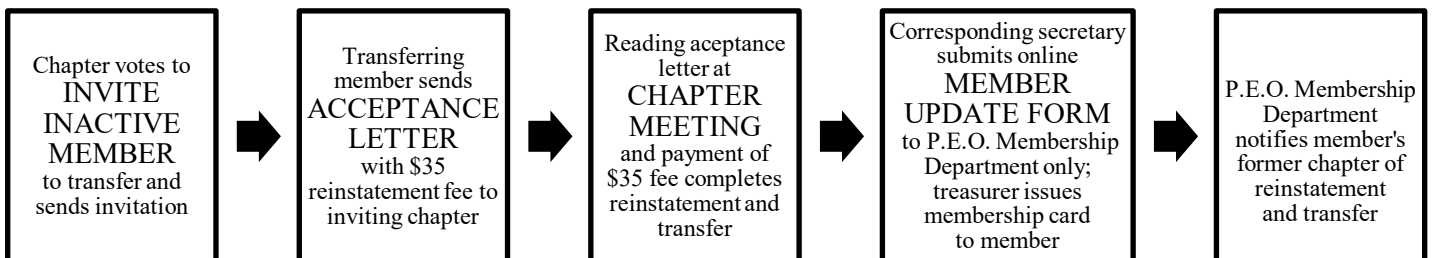
## TRANSFER PROCESS



## REINSTATEMENT PROCESS FOR INACTIVE MEMBER



## REINSTATEMENT PROCESS FOR INACTIVE MEMBER TRANSFERRING TO NEW CHAPTER



# INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) TREASURER

Instructions may be downloaded from the P.E.O. International member website:

**Address:** <https://members.peointernational.org>

**Username:** sisterhood

**Password:** seven (followed by the current year, e.g., seven2022)

## RETENTION RECORD

TYPE OF RECORD	RETENTION
<b>Retain or destroy material in accordance with this record.</b>	
Annual Report of Treasurer	Six years
Annual Summary of Treasurer, Form IRS-LC (U.S chapters only)	Six years
Bank deposit slips, withdrawal slips, bank statements, check stubs or register	Six years
Canceled checks	Keep according to state, provincial or district law
Chapter IRS identification number (U.S. chapters only)	Life of chapter
Emblem Order form	Destroy after order checked and found correct
Financial ledger spreadsheets	Six years following last entry
Monthly treasurer reports	Retained in recording secretary's files
Receipt Book duplicates	One year
Roll Call Pages	Two years: the current and the previous year
Savings passbooks	Six years following last entry

<b>GENERAL INFORMATION</b>	
<ul style="list-style-type: none"> <li>• Study Part III of the Constitution, bylaws and standing rules of local, s/p/d and International chapters.</li> </ul>	<b>Constitution, Bylaws &amp; Standing Rules</b>
<ul style="list-style-type: none"> <li>• Deliver to successor all books, papers and supplies at the expiration of term of office and train successor on the duties and responsibilities of the office.</li> <li>• Update signature(s) on chapter bank account(s) for current president and treasurer.</li> </ul>	<b>Officer Transition</b>
<ul style="list-style-type: none"> <li>• Receive and disburse funds of the chapter. Give receipts for all cash received or upon request. Enter all transactions in Local Chapter Treasurer’s Financial Records and Roll Call book.</li> <li>• Deposit all money from dues, gifts, fundraisers, ways and means, etc., into a chapter bank account.</li> <li>• The first receipt issued on or after March 1 shall be No. 1.</li> <li>• A budgeted item requires approval by chapter vote before a check may be written.</li> <li>• All disbursements of a local chapter are to be approved by chapter vote prior to payment.</li> <li>• Chapter Meeting – Call the roll at each meeting; include those members who have indicated their presence via telephone.</li> </ul>	<b>Treasurer’s Duties</b>
<ul style="list-style-type: none"> <li>• Report to the chapter at the first meeting of each month using Treasurer’s Monthly Report to Chapter form. The report is dated the first day of the month. <ul style="list-style-type: none"> <li>○ A consolidated report may be given at the first meeting following a vacation period.</li> <li>○ The report is filed with the recording secretary and only the summary is recorded in the minutes.</li> <li>○ The report is kept for the Auditing Committee.</li> </ul> </li> <li>• Present all bills. <ul style="list-style-type: none"> <li>○ Members shall submit bills to the treasurer before the meeting begins.</li> </ul> </li> </ul>	<b>Reports Given at Chapter Meetings</b>
<ul style="list-style-type: none"> <li>• Credit cards are not to be issued or held using the name or tax ID number of a local chapter. Credit cards that are automatically issued in conjunction with a bank account should be destroyed and not used.</li> <li>• The treasurer shall pay all bills of the chapter by check or debit card. The chapter must give prior approval before a check is written or a debit card is used.</li> </ul>	<b>Local Chapter Credit / Debit Cards</b>



<ul style="list-style-type: none"> <li>• Chapters may choose to receive funds by debit/credit card reader (Square, Roampay, Payanywhere, etc.) and/or Peer-to-Peer (P2P) mobile app service (Venmo, Zelle, Square Cash, etc.) to accept payments for: <ul style="list-style-type: none"> <li>○ Dues, Initiation and Reinstatement Fees</li> <li>○ Fundraisers</li> <li>○ Non-tax deductible donations to chapters (for tax deductible donations, please refer to the Treasurer section on Contributions to P.E.O. Projects)</li> </ul> </li> <li>• The debit/credit card reader and/or P2P service must be linked directly to the chapter’s bank account. At the chapter’s discretion, transaction fees associated with this service may be paid by chapter funds or, if allowed by state or provincial law, added to the charges processed for the card holder. Use of a debit/credit card reader and/or P2P service must be approved by chapter vote.</li> </ul>	<p><b>Receiving Payments by Debit/Credit Card Reader and/or Peer-to-Peer Mobile Apps</b></p>
<ul style="list-style-type: none"> <li>• Remit immediately chapter contributions to P.E.O. projects to the treasurer (or paid assistant) of the s/p/d chapter or, if in non-chartered territory, to the Director of Finance/Treasurer of International Chapter.</li> <li>• Forward immediately to the Director of Finance/Treasurer of International Chapter contributions to qualified International Chapter P.E.O. projects received from individuals (members and nonmembers), with the exception of Cottey College. Contributions for Cottey College should be forwarded directly to the college.</li> <li>• Do not record contributions in the Local Chapter Treasurer’s Financial Records and Roll Call Book. These contributions are tax-deductible if conveyances (checks, money orders, etc.) are: <ul style="list-style-type: none"> <li>○ made payable to the qualified project; and</li> <li>○ forwarded without endorsement or deposit.</li> </ul> </li> </ul>	<p><b>Contributions to P.E.O. Projects</b></p>
<ul style="list-style-type: none"> <li>• Contributions by individuals should be made payable to the P.E.O. Foundation and sent by the donor to the Director of Finance/Treasurer of International Chapter.</li> <li>• Do not deposit P.E.O. Foundation contributions by individuals or record them in the Local Chapter Treasurer’s Financial Records and Roll Call Book. The contributions are deductible for U.S. federal income, state and gift tax purposes only if conveyances (checks, money orders, etc.) are made payable to the P.E.O. Foundation.</li> </ul>	<p><b>Individual Contributions to P.E.O. Foundation</b></p>
<ul style="list-style-type: none"> <li>• Chapter contributions to the P.E.O. Foundation should be made payable to the s/p/d chapter and sent immediately to the treasurer (or paid assistant) of the s/p/d chapter or, if in non-chartered territory, to the Director of Finance/Treasurer of International Chapter.</li> </ul>	<p><b>Chapter Contributions to P.E.O. Foundation</b></p>

<ul style="list-style-type: none"> <li>• Supplies may be ordered by the following methods:             <ul style="list-style-type: none"> <li>○ Local Chapter Supply Order form: Send with correct remittance to P.E.O. Supply Department, 3700 Grand Avenue, Des Moines, IA 50312. Form may be downloaded from the P.E.O. International member website.</li> <li>○ Credit card orders on the P.E.O. International member website: Member ID # will be requested to access this section of the website. Refer to IOLC section <a href="#">Glossary of Terms and Abbreviations</a> for guidelines on obtaining Member ID #.</li> </ul> </li> <li>• Keep on hand at all times the required supplies for office as shown on List of Supplies for Officers of Local Chapters. Forms available on the P.E.O. International member website may be downloaded when needed.</li> <li>• Order a Constitution from the P.E.O. Supply Department to give to the new initiate under Suggestions for the Good of the Chapter on the date of her initiation.             <ul style="list-style-type: none"> <li>○ If New Member Welcome Kit is ordered from the P.E.O. Supply Department, a Constitution is included.</li> </ul> </li> </ul>	<p><b>Supplies</b></p>
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<p><b>EMBLEMS</b></p>	
<ul style="list-style-type: none"> <li>• The P.E.O. Emblem Division receives emblem orders, related correspondence and returned emblems.</li> <li>• Use the Official Emblem Order Form for ordering all emblems and send with correct remittance to the P.E.O. Emblem Division. Emblems may be ordered online with a credit or debit card payment. The treasurer will order and deliver emblems for initiates and for others upon request. (Constitution, Part III, ARTICLE V, Sec. 6)</li> <li>• The name listed for engraving must agree with the name of the member as recorded in the Annual Report of Corresponding Secretary.</li> <li>• Emblem for a member MUST NOT be ordered until after her Initiation by Affirmation.</li> <li>• Two clasp options for the P.E.O. emblem are available. One style has the traditional safety latch; the second style has a button-back clasp. Purchase price is the same for both styles. Determine which style the member prefers before ordering.</li> <li>• Confer with the corresponding secretary to see that the online Member Update form has been sent to the Membership Department.</li> <li>• Emblem, Member ID # and The P.E.O. Record will be received following receipt of the Member Update form by the Membership Department.</li> </ul>	<p><b>Emblem Orders for New Member</b></p>
<ul style="list-style-type: none"> <li>• Use the Official Emblem Order Form entering the reinstatement date on the form.             <ul style="list-style-type: none"> <li>○ The reinstating chapter orders the emblem, if needed, using funds from the reinstatement fee.</li> </ul> </li> </ul>	<p><b>Emblem Order for Reinstating Member</b></p>

<b>ANNUAL DUES</b>	
<ul style="list-style-type: none"> <li>• At least six weeks prior to March 1, notify all active members that dues are payable including nonresidents and members whose transfers have not been accepted. Send second notice if necessary.</li> <li>• Determine prior to March 1 potential need by member(s) for assistance with dues.</li> <li>• Collect annual dues from the members.</li> <li>• Membership Cards are issued and serve as receipts when dues are paid. Membership Cards are available from the Supply Department or fill/print from the website.</li> <li>• Issue Membership Card to each member who has paid dues for the upcoming year (March 1–February 28/29).</li> <li>• Issue Membership Card to members who reinstate during the year.</li> <li>• Fifteen dollars of the initiation or reinstatement fee shall be held, then forwarded, with the annual dues and in addition to them. (Constitution, Part III, ARTICLE VIII, Sec. 1; ARTICLE IX, Sec. 1)</li> <li>• A member remains an active member of her current chapter until another chapter has accepted her transfer. If inviting chapter does not accept a transfer before February 1, the current chapter must collect s/p/d and International chapter dues from the member.</li> </ul>	<p><b>Notice / Collection of Dues</b></p>
<ul style="list-style-type: none"> <li>• The following procedure may be used to advance the dues for a member whose dues have not been received before March 1: <ul style="list-style-type: none"> <li>○ At the last meeting of the chapter in February, the treasurer announces the name of any member whose dues have not been received. By vote of the chapter, the treasurer may be authorized to advance s/p/d and International dues. (Payment of these dues maintains the member’s active status.)</li> <li>○ The treasurer remits dues to the s/p/d treasurer for all paid members and those whose dues were voted on to be advanced. A notation should be made in the description section of the checking spreadsheet that dues were advanced for members. No other entry is made on the spreadsheet other than the amount of the dues paid.</li> <li>○ If the dues are received the next month, the treasurer makes a deposit and enters the transaction like any other dues deposit. A notation should be made in the description section that dues were reimbursed by members. No other entry is made on the spreadsheet.</li> </ul> </li> </ul> <p>Note: Dues collected (receipts) will not equal dues paid (disbursements) when dues have been advanced during the year.</p> <ul style="list-style-type: none"> <li>○ In using this process, the chapter maintains the integrity of the accounting records, recording only what was actually received and disbursed each year.</li> </ul>	<p><b>Explanation of Dues Advancement for Treasurer’s Record Book Entry</b></p>
<ul style="list-style-type: none"> <li>• Send s/p/d and International chapter dues to the treasurer (or paid assistant) of the s/p/d chapter or, if in non-chartered territory, to the Director of Finance/Treasurer of International Chapter. (Constitution, Part I, ARTICLE VIII, Sec. 1; Part III, ARTICLE VIII, Sec. 1 and 2; ARTICLE IX, Sec. 1)</li> </ul>	<p><b>Payment to International and S/P/D Chapter</b></p>

<ul style="list-style-type: none"> <li>For chapters in the United States, record chapter IRS identification number and keep in the Local Chapter Treasurer's Financial Records and Roll Call Book.</li> </ul>	<b>IRS Identification Number</b>
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<b>ANNUAL REPORT</b>	
<ul style="list-style-type: none"> <li>Annual report forms and instructions will be sent to chapter president in January. Check with president to receive annual report materials.</li> </ul>	<b>Receipt of Materials</b>
<ul style="list-style-type: none"> <li>Local chapters shall notify the Director of Finance/Treasurer of International Chapter (this information will be requested at time of annual reports) of any funds held for local scholarships, grants and/or educational loans in order to protect the tax-exempt status of the P.E.O. Sisterhood. Local chapters bear the responsibility to administer such funds. Any questions regarding IRS compliance should be directed to the Director of Finance/ Treasurer.</li> </ul>	<b>Funds held for Local Scholarships</b>
<ul style="list-style-type: none"> <li>Complete annual report forms for the year and send no later than March 10.</li> </ul>	<b>Due Date</b> (March 10)
<ul style="list-style-type: none"> <li>Annual reports of the treasurer and corresponding secretary <b>MUST AGREE</b> and must be signed by the respective officers and president before being sent.</li> </ul>	<b>President's Signature</b> (required)
<ul style="list-style-type: none"> <li>Retain books and supplies until notice of release is received from the treasurer (or paid assistant) of the s/p/d chapter or, if in non-chartered territory, from the Director of Finance/Treasurer of International Chapter.</li> <li>When approved copies of the annual report are returned, read the 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 treasurer.</li> <li>Copies of annual reports must be kept for six years.</li> </ul>	<b>Retention Requirements</b>

## **ROLL CALL**

### **PROCEDURE FOR PREPARING THE ROLL CALL**

1. A new roll is made as of March 1 each year.
2. List the names of active resident members in alphabetical order.
3. Leave space for adding names of initiates or members received by transfer or reinstatement of membership.
4. List the names of active nonresident members in alphabetical order.

### **ROLL CALL**

1. When attending in-person, remain seated when the president states that the treasurer will call the roll. Stand after roll is called, address the chair and announce the number present.
2. Immediately following the report of attendance, continue with the remaining reports: the monthly financial report (if the first meeting of the month) and the presentation of bills.
3. The roll is called (including the treasurer's name) at each regular and special meeting. Members respond by saying "present."
4. Names of nonresident members are called only when present.
5. Names of resident members, who for legitimate reasons can never attend chapter meetings, may be omitted in the roll call if the chapter desires.
6. As the roll is called, mark 1, 2, 3, etc. in pencil so the report may be given promptly.
7. Add numbers in sequence for members arriving during the meeting after the number present has been announced.

### **RECORD DECREASES IN MEMBERSHIP**

1. Record the date of decrease in membership by death, transfer or expulsion on the line with the member's name.
2. Record the date in pencil in case of expulsion. Erase at the conclusion of the expulsion. Refer to the Constitution, Part III, Article XII, Sec. 2 regarding dues of an expelled member if such period extends over March 1.

### **SPECIAL LIST FOR MEMBERS INDEBTED TO THE CHAPTER**

1. Prepare a special list for members not entitled to vote due to indebtedness.
2. Record date and amount of indebtedness. Record date when canceled.

### **RETENTION OF ROLL CALL RECORDS**

Keep for two years (the current and the previous year).

### **REFILLS**

Order refill pages from the P.E.O. Supply Department or downloaded from the P.E.O. International member website.

# INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) CHAPLAIN

**Instructions may be downloaded from the P.E.O. International member website:**

**Address:** <https://members.peointernational.org>

**Username:** sisterhood

**Password:** seven (followed by the current year, e.g., seven2022)

<b>GENERAL INFORMATION</b>	
<ul style="list-style-type: none"><li>• Study Part III of the Constitution, bylaws and standing rules of local, s/p/d and International chapters.</li></ul>	<b>Constitution, Bylaws &amp; Standing Rules</b>
<ul style="list-style-type: none"><li>• Keep on hand at all times the required supplies for office as shown on List of Supplies for Officers of Local Chapters.</li></ul>	<b>Supplies of Office</b>
<ul style="list-style-type: none"><li>• Deliver to successor all books, papers and supplies at the expiration of term of office and train successor on the duties and responsibilities of the office.</li></ul>	<b>Officer Transition</b>
<ul style="list-style-type: none"><li>• It is not necessary for the chaplain to address the chair before conducting the devotions in any meeting format.</li><li>• Conduct the devotions of each regular and special meeting following instructions in the President's Book. Devotions are limited to a reading from the Bible or other inspirational text which is acceptable to the chapter. Any version of the Bible which contains both Old and New Testaments and which is acceptable to the chapter may be used; the P.E.O. prayer may be read by the chaplain or the recorded version may be used. If the chapter chooses to recite the Lord's Prayer, they may recite it in unison or use a pre-recorded version.</li></ul>	<b>Devotions</b>

# INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) GUARD

**Instructions may be downloaded from the P.E.O. International member website:**

**Address:** <https://members.peointernational.org>

**Username:** sisterhood

**Password:** seven (followed by the current year, e.g., seven2022)

<b>GENERAL INFORMATION</b>	
<ul style="list-style-type: none"><li>• Study Part III of the Constitution, bylaws and standing rules of local, s/p/d and International chapters.</li></ul>	<b>Constitution, Bylaws &amp; Standing Rules</b>
<ul style="list-style-type: none"><li>• Keep on hand at all times the required supplies for office as shown on List of Supplies for Officers of Local Chapters.</li></ul>	<b>Supplies of Office</b>
<ul style="list-style-type: none"><li>• Deliver to successor all books, papers and supplies at the expiration of term of office and train successor on the duties and responsibilities of the office.</li></ul>	<b>Officer Transition</b>
<ul style="list-style-type: none"><li>• The password will not be taken at any meeting. The guard shall conduct a visual verification of membership prior to the start of the meeting. Any unknown unaffiliate will show her current membership card or, if attending by telephone, notify the chapter of her chapter letters and location (city and state/province/district). A candidate for Initiation by Affirmation will be included from the start of her initiation meeting.</li></ul>	<b>Chapter Meeting Responsibilities</b>

# INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) POLICIES PERTAINING TO LOCAL CHAPTERS

Instructions may be downloaded from the P.E.O. International member website:

**Address:** <https://members.peointernational.org>

**Username:** sisterhood

**Password:** seven (followed by the current year, e.g., seven2022)

<b>KEY GUIDELINES</b>	
<ul style="list-style-type: none"><li>A local chapter shall use the Procedure for P.E.O. Chapter Meeting and Ceremony of Installation as they appear in the President's Book. (Constitution, Part I, ARTICLE IV, Sec. 4)</li></ul>	<b>Statement of Policy During COVID-19</b>
<ul style="list-style-type: none"><li>The P.E.O. Sisterhood, or any division thereof, shall not affiliate with any other organization. (Constitution, Standing Rule #1)</li><li>Reciprocities, P.E.O. Groups, s/p/d chapters and local chapters shall not establish a P.E.O. fund within a college educational foundation or community foundation.</li></ul>	<b>Affiliations</b>
<ul style="list-style-type: none"><li>The Constitution, Bylaws and Standing Rules of International Chapter and the bylaws and standing rules of s/p/d and local chapters shall be followed as the rules and regulations of the Sisterhood. International, s/p/d and local chapters are not permitted to try procedures which are contrary to the Constitution or their respective bylaws and standing rules.</li><li>When an item has been adopted at Convention of International Chapter or s/p/d chapter which must be implemented by the local chapter, all local chapters must edit their bylaws and standing rules accordingly and send copy as instructed by the s/p/d executive board.</li><li>The year following Convention of International Chapter, the Constitution and all revisions relating to the local chapter shall be sent directly and billed to the chapters as directed by the Executive Board of International Chapter. The bill will appear on the Annual Report of Treasurer of Local Chapter.</li></ul>	<b>Constitution, Bylaws &amp; Standing Rules</b>



<ul style="list-style-type: none"> <li>• If a local chapter wishes to propose an amendment to one of the International documents listed below, the chapter president should contact the Amendments and Recommendations chair of the s/p/d chapter for detailed instructions on the procedures to be followed. International documents that may be amended are: <ul style="list-style-type: none"> <li>○ Constitution: Introduction, Part I, Part II and Part III</li> <li>○ Bylaws and Standing Rules of International Chapter</li> <li>○ Procedure for P.E.O. Chapter Meeting (which includes the Opening Ode, Objects and Aims and Ceremony of Initiation)</li> </ul> </li> </ul> <p>Note: The portions of the Procedure for P.E.O. Chapter Meeting and Ceremony of Initiation that are in italics are instructions from the Executive Board of International Chapter and are not amendable.</p> <ul style="list-style-type: none"> <li>• The Manual for the Amendments and Recommendations Committee is available on the P.E.O. International member website.</li> </ul>	<p><b>Proposed Amendments to the Constitution, Bylaws and Standing Rules, and Procedures for P.E.O. Chapter Meeting</b></p>
<ul style="list-style-type: none"> <li>• For chapters in the U.S., <b>Internal Revenue Service Identification Numbers</b> will be assigned by the P.E.O. Executive Office in Des Moines, Iowa. Each chapter is to have only one ID number which is to be used on all bank accounts as well as on Form IRS-LC, Annual Summary of Treasurer of Local Chapter, filed with the P.E.O. Executive Office in March. <ul style="list-style-type: none"> <li>○ IRS Identification numbers are typically assigned within 2-3 weeks following a chapter organization meeting.</li> <li>○ All questions concerning IRS identification numbers should be directed to the P.E.O. Executive Office; any correspondence received from the IRS should be forwarded to the P.E.O. Executive Office for handling. <b>Do not contact the IRS.</b></li> </ul> </li> <li>• <b>IRS Classification</b> <ul style="list-style-type: none"> <li>○ No local chapter shall be allowed to obtain an IRS 501(c)(3) charitable classification for local chapter funds.</li> </ul> </li> </ul>	<p><b>IRS Identification Numbers &amp; Classification</b> (Chapters in US only)</p>
<ul style="list-style-type: none"> <li>• If a charter of a local chapter is lost, a new charter may be purchased for \$18 from the P.E.O. Executive Office upon recommendation of the organizer of the s/p/d or International chapter. Requests should be emailed to the executive director. A replacement charter shall be reissued in the name of the original governing body, i.e., Supreme Grand, Supreme or International Chapter.</li> </ul>	<p><b>Lost Charter</b></p>
<ul style="list-style-type: none"> <li>• The name of one city only shall be used to designate a chapter.</li> <li>• A proposal for change in location of a local chapter shall be presented at a meeting of the chapter and voted upon at the next meeting. A two-thirds (<math>\frac{2}{3}</math>) affirmative vote of members present shall be required. Action taken shall be reported to the president of the s/p/d chapter. Refer to IOLC <a href="#">Exhibit A</a> – Procedure for Securing Change in Location of a Local Chapter of the P.E.O. Sisterhood. <ul style="list-style-type: none"> <li>○ Upon receipt of the chapter report, the president of the s/p/d chapter shall send the Petition of Local Chapter for Change in Location of Chapter Designation to be completed by the chapter and returned to the secretary of the s/p/d chapter. Refer to IOLC <a href="#">Exhibit B</a> – Petition of Local Chapter for Change in Location of Chapter Designation.</li> <li>○ The treasurer of the local chapter shall forward payment of the \$15 fee to the executive director.</li> </ul> </li> </ul>	<p><b>Change in Chapter's City Designation</b></p>

<ul style="list-style-type: none"> <li>• By decision of each local chapter, yearbooks may be distributed electronically with printed copies made available for members upon request and to s/p/d officers as required.</li> <li>• Username and password for the International Chapter website are not printed in yearbooks.</li> </ul>	<b>Yearbooks</b>
<ul style="list-style-type: none"> <li>• Chapter meetings, as listed in the yearbooks, that are canceled for reasons of emergency (e.g., inclement weather, etc.) are not rescheduled.</li> <li>• Chapter meetings, as listed in the yearbooks, that are canceled because of lack of quorum are not rescheduled.</li> </ul>	<b>Canceled Meetings</b>

<b>LEGAL ENTITIES</b>	
<ul style="list-style-type: none"> <li>• No local chapter or group of local chapters shall incorporate or form any partnership, trust or other legal entity without first securing the written approval of the executive board of the s/p/d chapter having jurisdiction over the chapter or group of chapters. Consent is also required from the Executive Board of International Chapter.</li> </ul>	<b>Incorporation or Formation of Other Legal Entities</b>
<ul style="list-style-type: none"> <li>• Should a local chapter be the recipient of real property, title to such property may be held by the P.E.O. Foundation and, under direction of the Foundation trustees, the local chapter may act as administrative agent.</li> </ul>	<b>Real Property</b>

<b>MISCELLANEOUS</b>	
<ul style="list-style-type: none"> <li>• Observance of Founders' Day shall be done in accordance with s/p/d bylaws and standing rules.</li> </ul>	<b>Founders' Day</b>
<ul style="list-style-type: none"> <li>• The storage of local chapter minutes and/or historical memorabilia may not be housed in a facility (e.g., library, museum, college archives, historical society, etc.) which would allow access to the materials by the public (anyone other than P.E.O. members).</li> <li>• Minutes older than 10 years may be archived on digital media. If this method of preservation is chosen, the chapter is responsible to maintain the archived minutes on current technology.</li> <li>• For more information, see <a href="#">P.E.O. Historical Collections Guidelines for Local Chapters</a>.</li> </ul>	<b>Archival Storage for Minutes and/or Historic Memorabilia</b>
<ul style="list-style-type: none"> <li>• S/P/D and local chapters wishing to collect and remit funds in response to a natural disaster or other catastrophe may do so only at the s/p/d or local chapter level. In order to protect its educational and charitable status, the P.E.O. Foundation will accept no funds for disaster relief purposes.</li> <li>• All disaster relief funds are to be temporary and are not to take precedence over support for the P.E.O. philanthropic projects. Any communications regarding s/p/d and local disaster relief efforts should be approved by the executive board of the s/p/d chapter.</li> </ul>	<b>Disaster Relief Funds</b>

<ul style="list-style-type: none"> <li>• The supplies of a local or s/p/d chapter lost or damaged due to a disaster shall be replaced free of charge by International Chapter upon request of the president of the s/p/d chapter.</li> <li>• When a member’s emblem is lost due to a natural disaster such as a flood, tornado or hurricane, the emblem shall be replaced by International Chapter at no charge. This includes a past president of International Chapter’s recognition emblem and a past s/p/d president’s recognition emblem.</li> </ul>	<p><b>Losses Due to Natural Disaster</b></p>
<ul style="list-style-type: none"> <li>• If an event is held in an establishment that is in the business of selling liquor, it is the responsibility of the establishment to maintain liquor liability insurance and a valid liquor license. It is also their decision to determine who to serve and, more importantly, who not to serve.</li> <li>• If an event is held in a member’s home, liability will be the responsibility of the homeowner. The homeowner’s insurance coverage should be verified prior to the event and will be considered primary in the event of a claim.</li> <li>• If a chapter, reciprocity or other group of chapters sponsors an event in a public venue involving the consumption and/or sale of alcohol, it will be their responsibility to obtain any event insurance required by the venue and investigate the applicable local and state/provincial/district laws pertaining to a liquor license requirement.</li> <li>• Under no circumstances may a P.E.O. chapter, reciprocity (or other group of chapters) or a member acting on behalf of P.E.O. obtain a liquor license.</li> </ul>	<p><b>Alcohol Policy</b></p>
<ul style="list-style-type: none"> <li>• P.E.O. does not carry automobile insurance to cover vehicles rented by any members other than the Executive Board of International Chapter.</li> <li>• For all other members of the P.E.O. Sisterhood (including members of boards and committees, s/p/d officers and local chapter members), their personal auto insurance shall be the only auto insurance coverage for damages to the rental vehicle as well as any liability for bodily injury or property damage to others. Liability insurance would cover P.E.O. as an organization, but not individual members in the event a third party filed a claim against P.E.O. for damages or injuries incurred while a member was driving a rented vehicle.</li> <li>• It is strongly advised that members traveling for P.E.O.-related business NOT rent a vehicle unless purely for personal use.</li> </ul>	<p><b>Car / Vehicle Rental</b></p>
<ul style="list-style-type: none"> <li>• News release templates are available on the P.E.O. International member website for local chapters for the following purposes:</li> <li>• Refer to the Publicity Policy to:             <ul style="list-style-type: none"> <li>○ Promote upcoming public events and fundraisers. Local chapters should consult the Media Guide available on the P.E.O. International member website for assistance in style; and</li> <li>○ Promote recipients for International, s/p/d and local chapter projects. Unless a signed copy of the <a href="#">P.E.O. Photograph and Publicity Consent Form</a> is received from recipient, no personal, identifying information can be shared on news media, P.E.O. websites or social media accounts.</li> </ul> </li> </ul>	<p><b>Publicity Policy</b></p>

<ul style="list-style-type: none"> <li>• The P.E.O. insignia registered in the U.S. Patent Office (#766095) may only be used on items for official business of local, s/p/d and International chapters (including P.E.O. Groups) or on articles sold by the P.E.O. Supply Department.</li> <li>• Approval is given for the use of the P.E.O. emblem on a headstone or a P.E.O. grave marker at the place of burial of a member if the family of the deceased so desires. The P.E.O. emblem may also be used as an identifying logo on an official P.E.O. website or a convention program/proceedings.</li> <li>• The P.E.O. emblem shall only be used as a standalone insignia. It may not be incorporated or used as an enhancement in other graphic designs.</li> <li>• Other star designs and informal stylized logo may be used at the chapter’s discretion.             <ul style="list-style-type: none"> <li>○ Exception: Informal, stylized designs shall not be used on a headstone or grave marker. For uses of a more serious nature, the registered “star” logo should continue to be used.</li> </ul> </li> </ul>	<p><b>Use of P.E.O. Insignia</b></p>
<ul style="list-style-type: none"> <li>• No photos or videos of the Initiatory Emblem may be taken for any reason. Photos of the initiate(s) and members are allowed after the meeting is adjourned. The Initiatory Emblem is not to be used during the COVID-19 pandemic emergency.</li> </ul>	<p><b>Initiatory Emblem</b></p>
<ul style="list-style-type: none"> <li>• Quotations from the Procedure for P.E.O. Chapter Meeting (except the Opening Ode and Objects and Aims), Ceremony of Initiation, and Ceremony of Installation shall not appear in yearbooks, The P.E.O. Record, or papers which may come before the public. (Constitution, Part III, ARTICLE XI, Sec. 5)</li> </ul>	<p><b>P.E.O. Quotations</b></p>
<ul style="list-style-type: none"> <li>• P.E.O. informational materials prepared by local chapters shall not be advertised for sale in The P.E.O. Record. They shall not be circularized, sold or distributed in any way without permission of the executive board of the s/p/d and/or International Chapter.</li> </ul>	<p><b>P.E.O. Informational Materials</b></p>

1. The primary purpose of a P.E.O. website for a state/provincial/district (s/p/d) or local chapter or a P.E.O. Group is to provide information only.
2. Please refer to the P.E.O. International member website Brand Resource Center for resources.
3. Adhere to Constitution Standing Rule #2. Also refer to Policies section of IOLC [Circularization](#) for information.
4. Information must be of local or s/p/d chapter interest.
5. Local chapters' websites may be used to sell items as part of fundraising. Refer to Policies section of IOLC [Direct Sale of Goods](#) for requirements.
6. Any P.E.O. website must be secured by a password. The use of P.E.O. membership lists and/or addresses is prohibited unless in the password protected area of the website to limit exposure to any mass mailing and solicitations. If a chapter chat room is included, topics must be limited to items of general information such as programs, fundraising, social activities, etc.
7. Consult the P.E.O. International member website for current project information.
8. Applicants for P.E.O. projects shall not be solicited on a website. The only exception is student application forms available on the Cottey College website.
9. Keep the information on the website current.
10. When creating a website do NOT use the official P.E.O. insignia (the star, letters P.E.O. and Greek key design). The new informal logo with the yellow and pink daisy, a rendering of the emblem, stylized stars or marguerites may be used. Be cognizant that the appearance of your "Facebook wall" or social media front page portrays an image of P.E.O. to everyone – members and nonmembers.
11. CAUTION – It is important to contact and provide information for all members not on email or members without access to a website.
12. Local Chapters/P.E.O. Groups: You MUST register your site and any passwords with your s/p/d president.

**Note:** Chapter minutes may not be posted on websites.

S/P/D Chapters: You MUST register your site and any passwords with the executive office. Send all applicable information to [mediamanager@peodsm.org](mailto:mediamanager@peodsm.org).

### Website Guidelines

## SOCIAL MEDIA

- Local and s/p/d chapters can use social media to stay connected with each other online and/or to share with others about their chapter. Accounts for local or s/p/d chapters are to be owned and managed by the chapter and are not monitored by International Chapter. Participation or interaction with any local or s/p/d chapter social media presence is at the discretion of each individual person.

- Chapters using social media should consider the following:

A page or a group can be created on Facebook for a chapter. A page is public-facing and can be viewed by members and nonmembers alike. It is a good option if the intention is to bring awareness to the chapter and to P.E.O. If a page is chosen, be cognizant of what is posted as it can be viewed by anyone. A group can be closed, requiring the group administrator to approve members. A group is best if the chapter wants to have a discussion forum or posting board for members.

Platforms such as Instagram, Pinterest and Twitter are generally visible to anyone; however, they can be set to private if desired. It is up to the administrator of these accounts to manage these settings and for the chapter to determine the intent and preference for these accounts.

- Groups created for local, state, provincial and district chapters as well as groups created for the purpose of connecting P.E.O.s are required to adhere to the following:

1. Naming structure

- a. For local chapter groups – P.E.O. Chapter A, Daisytown, Iowa
- b. For s/p/d groups – P.E.O. Iowa State Chapter
- c. For outside/non-chapter groups – P.E.O. (insert name of group)

2. Groups and conversations must uphold the P.E.O. brand, essence, voice and the Objects and Aims (see P.E.O. Brand Tool Kit).
3. Groups, except for a local chapter group, must notify International Chapter of the group by emailing [mediamanager@peodsm.org](mailto:mediamanager@peodsm.org) with the name of the group and administrator(s).
4. Group administrators are responsible for monitoring discussion and removing content that does not uphold the P.E.O. values. Groups that do not may be required to close or remove P.E.O. from their name as directed by International Chapter.
5. If the group is set up as a “Closed Group,” administrators must verify P.E.O. membership prior to granting access.
6. Any group with P.E.O. in its name must post and adhere to Rules and Etiquette. The Rules and Etiquette below must be posted as part of the group description, included in the “about” section and potential members must agree to follow the group’s Rules and Etiquette before being allowed to join.

### Rules and Etiquette

P.E.O. International encourages members to come prepared to share successes, challenges, provide constructive feedback, bring questions and provide perspective in all manners related to chapter life. Members must agree to follow the Rules and Etiquette to ensure the group remains an open space to discuss issues and topics

related to P.E.O. chapters.

Promotional messages are not permitted in P.E.O. groups.

- Uphold the P.E.O. brand and our Objects and Aims.
- Don't attack others. The discussions on social media are meant to stimulate conversation not to create contention. Let others have their say, just as you may.
- Don't post commercial messages.
- Group posts should not contain promotional material, special offers, job offers, product announcements or solicitation for services.
- Fundraising posts – refer to Policies section of IOLC [P.E.O. Fundraising](#).
- All defamatory, abusive, profane, threatening, offensive language or illegal materials are strictly prohibited and will be removed.
- Members who interact with P.E.O. on social media in any capacity should be reminded that they must abide by Constitution Standing Rule #2 – Circularization. Also refer to Policies section of IOLC [Circularization](#) for information.
- Refer to Policies section of IOLC [Promotion of Fundraisers on Social Media](#) for information on how to use social media for chapter fundraisers.
- The official P.E.O. insignia is only to be used by International Chapter; however, P.E.O. International posts that use the official insignia can be shared to a chapter page, group or other social media profile. Other logos and graphics may be used.
- International Chapter has official social media profiles on Facebook, Instagram, LinkedIn and Twitter. Use these profiles to find the most accurate information and to share content to your local or s/p/d chapter profiles.

Facebook: PEO International

Instagram: @peointernational

LinkedIn: International Chapter of the P.E.O. Sisterhood

Twitter: @PEOSisterhood

<b>CIRCULARIZATION</b>	
<ul style="list-style-type: none"> <li>• Standing Rule #2 in the Constitution, Bylaws and Standing Rules of the P.E.O. Sisterhood requires s/p/d and/or International executive board authorization for circularization among members, local chapters, reciprocity groups, P.E.O. Groups or hostess groups.</li> <li>• Circularization is defined as the circulation of letters, leaflets or canvassing by any other means (including social media, electronic or verbal communication) to other chapters and/or individual members of other chapters.</li> <li>• Examples of social correspondence that are not circularization requiring authorization:               <ul style="list-style-type: none"> <li>○ Fundraising correspondence among chapters within a state, province or district. The fundraiser shall be in compliance with the Fundraising Policy. Refer to Policies section of IOLC <a href="#">P.E.O. Fundraising</a>.</li> <li>○ A luncheon or other social event among chapters within a state, province or district.</li> <li>○ Social invitations, anniversary celebrations or greetings to local and/or s/p/d chapters in other states, provinces or districts.</li> </ul> </li> </ul>	<p><b>Definition / Examples</b></p>
<ul style="list-style-type: none"> <li>• In the absence of specific P.E.O. guidance, Robert’s Rules is the formally adopted parliamentary authority. As it pertains to proposed amendments to P.E.O. documents, guidance from Robert’s Rules tells us that it is essential that every side has an equal opportunity to explain the pros/cons during debate. Therefore, discussion about the merits of or concerns with amendments shall be avoided until all sides can be heard during debate at convention.</li> <li>• Absentee or proxy ballots are not allowed for local chapter business.</li> </ul>	<p><b>Parliamentary Authority</b></p>
<ul style="list-style-type: none"> <li>• Authorization is required when the circularization within the state, province or district pertains to a project of the Sisterhood at large.               <ul style="list-style-type: none"> <li>○ If the circularization has been approved by a s/p/d convention, the consent of the s/p/d executive board is not required.</li> </ul> </li> <li>• An example of circularization that requires the authorization of the executive board of a s/p/d is:               <ul style="list-style-type: none"> <li>○ Contacting other chapters and/or individual members of other chapters with opinions on P.E.O. matters through social media, letters, petitions, leaflets and electronic or verbal communication.</li> </ul> </li> <li>• Any circularized communication should include a statement that authorization has been granted by the s/p/d executive board (and the Executive Board of International Chapter when required).</li> </ul>	<p><b>Authorization Required by S/P/D Executive Board</b></p>



<ul style="list-style-type: none"> <li>• Authorization is required by the Executive Board of International Chapter when the circularization would extend beyond the s/p/d chapter. This is not applicable to social correspondence.</li> <li>• Any circularized communication should include a statement that authorization has been granted by the Executive Board of International Chapter.</li> </ul>	<p><b>Authorization Required by International Executive Board</b></p>
<ul style="list-style-type: none"> <li>• Members, local chapters or s/p/d chapters shall not circularize other members, local chapters or s/p/d chapters for the sale of an item connected with the Ceremony of Initiation.</li> <li>• Members, local chapters or s/p/d chapters shall not circularize other members or local chapters beyond the boundaries of their state, province or district concerning the sale of goods and services whether the profit be for personal gain or the benefit of P.E.O. projects. Refer to Standing Rule #2 of the P.E.O. Sisterhood regarding circularization within a state, province or district.</li> <li>• P.E.O. members shall not use P.E.O. membership information for <i>private inurement</i>, which is an IRS concept that prohibits the use of nonprofit information or resources for personal financial gain or other business purposes.</li> </ul>	<p><b>Sales of Goods and Services</b></p>
<ul style="list-style-type: none"> <li>• Members provide us with their email addresses with the understanding they will not receive “unsolicited” or mass emails from P.E.O. members. Chapter presidents and state officers have allowed us to publish their email addresses for your convenience. Please respect their trust in us.</li> <li>• Circularization is defined as the circulation of letters or canvassing by any other means (including social media, electronic or verbal communications) to other chapters and/or individual members of other chapters. This rule is in place strictly for the protection of our members’ contact information and to limit solicitation. Our membership publications and listings (e.g., Directory of Presidents, Bed and Breakfast, Rx: TLC, Reciprocity Reference) and local chapter yearbooks are not to be used to compile mailing lists or send emails for one’s personal and/or business use.</li> <li>• Email addresses are only intended for official P.E.O. business and/or approved communications. Each P.E.O. should be aware of Standing Rule #2 in the Constitution, which requires s/p/d and/or International executive board authorization for circularization among members, local chapters, reciprocity groups or P.E.O. Groups.</li> </ul>	<p><b>Privacy Policy</b></p>

<p><b>MEMBERSHIP</b></p>	
<ul style="list-style-type: none"> <li>• P.E.O. membership lists are to be used exclusively by P.E.O.s and are not to be used, even by P.E.O.s, for circulation, solicitation or commercial purposes of any kind.</li> </ul>	<p><b>Membership Lists</b></p>
<ul style="list-style-type: none"> <li>• The lateral transfer provides a solution for the member who – for a variety of reasons – is now unable to attend 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.</li> <li>• Chapters should encourage the lateral transfer process when applicable. Use the Lateral Transfer Introduction form that is available on the P.E.O. International member website under Resource Library, Local Chapter Officers – President.</li> </ul>	<p><b>Lateral Transfer Introduction</b></p>

<ul style="list-style-type: none"> <li>The Introduction of a Woman Who Is Not a P.E.O. form, available on the P.E.O. International member website under Local Chapter Forms – President, may be used by a P.E.O. to introduce a woman who is NOT a P.E.O. member to a chapter(s) in another community.</li> <li>This form is an introduction. Although the chapter receiving this form is under no obligation to issue an invitation, please consider meeting this woman.</li> </ul>	<p><b>Introduction of a Woman Who Is Not a P.E.O.</b></p>
<ul style="list-style-type: none"> <li>Due to the COVID-19 pandemic emergency, Reaffirmation of Vows, during an <b>In-person Chapter Meeting</b> or <b>Hybrid Chapter Meeting</b>, will not be conducted until further notice. Reaffirmation of Vows may be conducted during a <b>Virtual Chapter Meeting</b>.</li> </ul>	<p><b>Reaffirmation of Vows</b></p>
<ul style="list-style-type: none"> <li>A member who has not paid s/p/d and International dues before March 1 is inactive. Refer to President’s section of IOLC <a href="#">Emblem Disposition for Inactive Member</a> for guidelines on return of an inactive member’s emblem.</li> <li>Members inactive for 25 years who have not been heard from within a reasonable number of years and/or whose whereabouts are unknown, shall be reported LC (lost contact) on the Annual Report of Corresponding Secretary. Refer to Corresponding Secretary’s section of IOLC <a href="#">Annual Reports</a> for instructions.</li> </ul>	<p><b>Inactive Member</b></p>

<p><b>P.E.O. RECIPROCITIES &amp; GROUPS</b></p>
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<ul style="list-style-type: none"> <li>When reciprocities have regular dues or per capita assessments, the dues shall be in the article on finance in the bylaws and standing rules of the local chapter. If the assessment is of a temporary nature, it need not be in the bylaws and standing rules but may be paid upon vote of the chapter.</li> </ul>	<p><b>Dues</b></p>
<ul style="list-style-type: none"> <li>All funds of P.E.O. Reciprocities and P.E.O. Groups shall be kept in checking accounts, savings accounts or other interest-bearing accounts.</li> <li>The Internal Revenue Service requires that identification numbers be on file for P.E.O. Reciprocities and Groups maintaining bank accounts.             <ul style="list-style-type: none"> <li>Identification numbers must be obtained by the P.E.O. Executive Office.</li> </ul> </li> </ul>	<p><b>Checking / Savings Accounts</b></p>
<ul style="list-style-type: none"> <li>Because P.E.O. Reciprocities and Groups are included under International Chapter's group exemption with the IRS, all fundraising events should comply with the current P.E.O. Fundraising Policy.</li> <li>Effective May 1, 2016, permanent funds may only be established through the P.E.O. Foundation in support of P.E.O. International projects.</li> </ul>	<p><b>Tax Exemption</b></p>

<p><b>BED &amp; BREAKFAST</b></p>
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<ul style="list-style-type: none"> <li>Due to the COVID-19 pandemic emergency, P.E.O. Bed and Breakfast is suspended until further notice.</li> </ul>	<p><b>General Guidelines</b></p>
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## PYRAMID OF GIVING



- In order to further the shared mission of the P.E.O. Sisterhood and to maintain compliance with the U.S. Internal Revenue Service, chapters should consider the P.E.O. Pyramid of Giving. This policy provides a three-tiered pyramid representing the three levels of contributions—International projects, state/provincial/district projects and local chapter interests.
- A chapter should consider giving on three priority levels. The base of the pyramid represents the largest portion of a chapter’s giving and this should be support to the International Chapter projects. The middle section of the pyramid represents contributions to state/provincial/district chapter projects. The smallest portion of the pyramid is the tip—the portion of chapter giving that is available for community support—such as honorariums for chapter speakers, minimal gifts to project recipients and local scholarships (whether paid directly from chapter funds or chapter donations made to those held in the P.E.O. Foundation).\*
- Though the exact amounts or percentages of giving may be different among chapters, the shape of the pyramid should guide chapter decisions and help to focus support on the projects that represent the shared mission of our Sisterhood.

*\*Please note that local chapter scholarships are permissible but not encouraged by International Chapter. Financial support of local chapter scholarships and community giving shall not exceed support to state/provincial/district projects, which shall not exceed International project support.*

See also: [P.E.O. Finances & Service Policy](#) in *P.E.O. Fundraising—Policies*, page 13.

## P.E.O. FUNDRAISING

**(Including sales of goods and services, raffles, auctions, etc.)**

The purpose of this policy is to allow members to support P.E.O. through various fundraising activities that reflect devotion to our principles, protection of members from legal liability and adherence to all applicable laws and regulations. Due to the COVID-19 pandemic emergency, all chapter fundraising activities must follow local health guidelines and Overarching Guidance for P.E.O. Gatherings.

### General Fundraising Policies

<ul style="list-style-type: none"> <li>In keeping with the mission of P.E.O., the focus of chapter funds and fundraising activities shall be International Chapter projects, followed by state/provincial/district projects. To protect International Chapter’s tax exemption with the U.S. Internal Revenue Service, chapters must demonstrate the mission of P.E.O. through financial support. Therefore, P.E.O. dollars, offered and earned by members in the name of P.E.O., should be considered primarily for approved P.E.O. projects and/or the P.E.O. Foundation with minimal chapter funds used for outside philanthropic or local educational activities.</li> <li>To strengthen P.E.O.’s visible influence in the community, chapters and chapter members are encouraged to offer their talents and skills, time and service for local philanthropic and educational endeavors.</li> </ul>	<b>P.E.O. Finances &amp; Service Policy</b>
<ul style="list-style-type: none"> <li>In any fundraising event sponsored by a chapter or by a member, it is imperative that the following statement be provided on all event advertisements or communications and distributed to all donors:   <i>“P.E.O. chapters support the educational and charitable funds of the P.E.O. Sisterhood but are not classified as charitable by the IRS. Therefore, donations to individual chapters do not meet the IRS requirements for a charitable income tax deduction. P.E.O. shall not be liable in any way for any goods and services supplied by third-party vendors or public establishments.”</i> </li> </ul> <p>Further, individual members must be made aware that they are potentially liable for any accident occurring on property owned by them or in any automobile or other motorized vehicle used or provided by them for any activity associated with P.E.O.</p>	<b>Required Notice</b>
<ul style="list-style-type: none"> <li>P.E.O. chapters are classified as nonprofit entities but are not considered charitable by the IRS under Section 501(c)(3). All donations to and payments for a chapter fundraiser must be issued directly to the chapter and are not eligible for a charitable contribution deduction. Payments are not to be made payable to any P.E.O. project or the P.E.O. Foundation in connection with a fundraiser involving exchange of goods or services.</li> </ul>	<b>Payments for Chapter Fundraisers</b>
<ul style="list-style-type: none"> <li>No member’s personal vehicle may be used for hire as a fundraising activity.</li> <li>P.E.O., as an organization, does not have automobile insurance that applies to any damage to the vehicle or liability to third parties, including passengers in the vehicle that arises from travel associated with P.E.O. functions of any type.</li> </ul>	<b>Use of Personal Vehicle</b>
<ul style="list-style-type: none"> <li>The cover of The P.E.O. Record may not be copied or used for commercial or fundraising purposes, except by the original artist.</li> </ul>	<b>Cover of P.E.O. Record</b>
<ul style="list-style-type: none"> <li>Chapters may advertise items for sale in the Fundraising Marketplace section of The P.E.O. Record and the P.E.O. International member website. Thumbnail pictures of the sale item(s) may be included on the website posting in accordance with the established fee structure.</li> </ul>	<b>P.E.O. Record Advertisements</b>

<ul style="list-style-type: none"> <li>All chapter fundraisers must be conducted and promoted using only volunteer labor.</li> <li>No form of compensation can be offered to any individual, organization or vendor (including professional fundraisers) to conduct, promote or sell items for a P.E.O. fundraiser.</li> </ul> <p>(Exception: Casino/Bingo Events must use a professional party company. Refer to Policies section of IOLC <a href="#">Casino/Bingo Events</a>.)</p>	<p><b>Volunteer Labor</b></p>
<ul style="list-style-type: none"> <li>Joint fundraisers are only allowed with other chapters or reciprocities. No joint fundraisers with non-P.E.O. entities are permitted. Income and expenses shall be allocated as follows: <ul style="list-style-type: none"> <li>Expenses can be paid directly by each chapter and income received and deposited by each chapter. (Each chapter would pay vendors for their share of expenses and receive income directly for the items they sell.) <b>OR</b></li> <li>One chapter maintains records and handles all income and expenses for the event. At the conclusion of the event, expenses and revenue are allocated in the same, though not necessarily equal, proportion. (If one chapter is responsible for 60% of expenses, they receive 60% of the revenue.) The exact allocation is determined by the chapters participating in the joint fundraiser.</li> </ul> </li> </ul>	<p><b>Joint Chapter Fundraisers</b></p>
<p>Promotion of fundraisers on social media shall adhere to the following guidelines:</p> <p>The details of a chapter fundraiser may be posted on social media accounts of a member, chapter, reciprocity or P.E.O. Group. These postings shall include only:</p> <ol style="list-style-type: none"> <li>The item(s) for sale or the name of the fundraising event</li> <li>Applicable date(s)</li> <li>Price</li> <li>Location</li> <li>P.E.O. chapter contact information</li> <li>A picture or graphic</li> </ol> <p>All fundraising posts on social media other than on a member, chapter, reciprocity or P.E.O. Group account are limited to:</p> <ol style="list-style-type: none"> <li>The item(s) for sale or the name of the fundraising event</li> <li>A picture or graphic</li> <li>Requests for information must be handled through private messaging.</li> </ol> <ul style="list-style-type: none"> <li>A sample post is “P.E.O. Chapter ABC makes a wonderful dry pancake mix! If you are interested in knowing more about it, please send me a personal message and I can share more details.”</li> <li>Postings shall not include links to commercial websites or any non-P.E.O. contact information. No endorsements or advertisements are allowed. Only the basic facts listed above may be posted.</li> </ul>	<p><b>Promotion of Fundraisers on Social Media</b></p>
<p>Before any sale of goods, determine possible sales tax liability. Contact the state department of revenue and inquire as to sales tax liability for an <i>upcoming</i> fundraiser held by a 501(c)(4) organization. Describe your proposed fundraiser only. Do not offer any information concerning past fundraisers or other chapters.</p>	<p><b>Sales Tax</b></p>

<p>Net income from P.E.O. fundraising activities (excluding P.E.O. Bed &amp; Breakfast) must be used for the following:</p> <ul style="list-style-type: none"> <li>• P.E.O. projects</li> <li>• Other qualified educational and/or charitable purposes</li> <li>• Chapter operating expenses/retained in chapter funds</li> <li>• Other activities as approved by the chapter</li> </ul>	<p><b>Fundraising Net Income</b></p>
<p>When sales of goods or services occur, details shall be reported annually on Form IRS-LC, Annual Summary of Treasurer of Local Chapter, including an itemized account of how the profit was allocated.</p>	<p><b>Reporting of Fundraising Activity on IRS-LC</b></p>
<p>The U.S. Internal Revenue Service discourages private inurement within nonprofit organizations. Private inurement is defined as individuals receiving financial benefit from their association with a nonprofit organization. In order to prevent the appearance of private inurement, P.E.O. members should avoid personal profit from any fundraising activity.</p>	<p><b>Private Inurement</b></p>
<p>Notifying other chapters of items for sale:</p> <ul style="list-style-type: none"> <li>• The rules of circularization apply as described in Standing Rule #2 of the Constitution, Bylaws and Standing Rules of the P.E.O. Sisterhood.</li> <li>• Refer to Policies section of the IOLC – <a href="#">Circularization</a> for definition and examples.</li> </ul>	<p><b>Circularization</b></p>
<p><b>Fundraising Activities</b></p>	
<p><b>Sales of purchased or donated items by local or s/p/d chapters, reciprocities or P.E.O. Groups</b></p> <p>When chapters, reciprocities or P.E.O. Groups purchase or receive items up front for the purpose of reselling at a profit, the following requirements shall apply:</p> <p><b>** Before beginning any fundraising activity, review the <a href="#">General Fundraising Policies</a> **</b></p> <ul style="list-style-type: none"> <li>• Sales must be to individuals only and NOT FOR RESALE.</li> <li>• There is no limit on the value of items.</li> <li>• All work in carrying on such sales must be done by the members or others for the organization WITHOUT COMPENSATION. (For example, fundraising items cannot be sold in a commercial setting where the business receives a portion of the sales.)</li> <li>• Chapters may sell items using a local or s/p/d chapter website (with permission of the executive board of s/p/d chapter).</li> <li>• Two separate entities each exempt from paying income tax may not each make a profit on the sale of the same item.</li> </ul>	<p><b>Direct Sale of Goods (with advance purchase of goods)</b></p>

<p><b>Sale of items through a third-party vendor</b></p> <p>Local or s/p/d chapters, reciprocities and P.E.O. Groups may sell items through a vendor website, pre-sale arrangement or shared commission arrangement according to the following guidelines:</p> <p><b>**Before beginning any fundraising activity, review the <a href="#">General Fundraising Policies</a>**</b></p> <ul style="list-style-type: none"> <li>• Sales must be to individuals only and NOT FOR RESALE.</li> <li>• There is no limit on the value of items.</li> <li>• The cost of items shall not vary based on the quantity sold.</li> <li>• The maximum duration of each fundraiser is 30 consecutive days and may not be repeated during the local chapter year (March through February).</li> <li>• The vendor shall not promote the event on behalf of the chapter or provide website access to P.E.O. fundraising items other than through secure access. (For example, a private code may be provided to access the section of a website where P.E.O. fundraising items are available.)</li> <li>• Delivery of items to the final buyer can be handled by the vendor OR sent to the chapter for final delivery.</li> <li>• Chapters shall not link to any non-P.E.O. website on social media.</li> <li>• Chapters do not have to limit sales to P.E.O. related items, such as star towels, marguerite notepads, etc., or market only to P.E.O. members.</li> <li>• Two separate entities each exempt from paying income tax may not each make a profit on the sale of the same item.</li> </ul> <p>When hosting home sales parties (jewelry, kitchen supplies, etc.), the party consultant should not be a P.E.O. member to avoid the appearance of private inurement. (See <a href="#">Private Inurement</a> above.)</p>	<p><b>Indirect Sale of Goods (without advance purchase of goods)</b></p>
<p>Local or s/p/d chapters, reciprocities and P.E.O. Groups may sell services.</p> <p><b>**Before beginning any fundraising activity, review the <a href="#">General Fundraising Policies</a>**</b></p> <ul style="list-style-type: none"> <li>• Sales must be to individuals only and NOT FOR RESALE.</li> <li>• No limit on value of services.</li> <li>• All work in carrying on such sales must be done by the members or others for the organization WITHOUT COMPENSATION.</li> <li>• No member's personal vehicle may be used for hire as a fundraising activity. (Refer to <a href="#">Use of a Personal Vehicle</a>).</li> <li>• No sales of services are allowed via websites.</li> </ul>	<p><b>Sales of Services</b></p>



**\*\*Before beginning any fundraising activity, review the [General Fundraising Policies](#)\*\***

- Permits
  - Local Chapters (Provide documentation to s/p/d chapter)
    - The chapter bears responsibility to research and follow all applicable gambling and tax laws and provide proof of such to the s/p/d chapter **prior** to the announcement of the event.
  - S/P/D Chapters (Maintain documentation in s/p/d chapter records)
    - S/P/D chapters holding these events must comply with all applicable gambling and tax laws and be able to provide proof of such to the auditor or Auditing Committee.
- Prizes
  - Services MUST be individually valued at \$500 or less.
    - Performed by a commercial business:
      - A gift certificate or other documentation spelling out the exact nature of the services should be provided to the recipient.
      - The business donating services must be informed that the chapter is NOT a 501(c)(3) charitable organization, meaning no charitable contribution tax deduction is available to the donor. Refer to Policies section of IOLC [Required Notice.](#))
    - Performed by a member for another individual:
      - Examples include meal preparation, lawn care, pet-sitting, etc.
      - EXCEPTION: No fundraising event shall include an offering of chauffer or delivery services, unless done by a professional commercial business.
  - Goods MUST be individually valued at \$500 or less.
    - The individual or commercial business donating goods must be informed that the chapter is NOT a 501 (c)(3), charitable organization, but merely nonprofit, meaning no charitable tax deduction is available to the donor. Refer to Policies section of IOLC
  - Individuals may offer time shares, vacation homes and other property for use in chapter fundraising. The property owner accepts all liability. P.E.O. bears no responsibility for property damage or bodily injury to users. Owner's insurance policy provides primary coverage.
- Online raffles are not permitted.

**Raffles and Other  
Fundraisers  
Involving an  
Element of Chance**



<p><b>**Before beginning any fundraising activity, review the <a href="#">General Fundraising Policies</a>**</b></p> <ul style="list-style-type: none"> <li>• Sales must be to individuals only and NOT FOR RESALE.</li> <li>• No limit on value of services.</li> <li>• All work in carrying on such sales must be done by the members or others for the organization WITHOUT COMPENSATION.</li> <li>• Individuals may offer time shares, vacation homes and other property for use in chapter fundraising. The property owner accepts all liability. P.E.O. bears no responsibility for property damage or bodily injury to users. Owner’s insurance policy provides primary coverage.</li> </ul>	<p><b>Auctions (Live and Silent)</b></p>
<p><b>**Before beginning any fundraising activity, review the <a href="#">General Fundraising Policies</a>**</b></p> <ul style="list-style-type: none"> <li>• All events such as casino nights, bingo events, poker games, etc. must be conducted using a properly licensed professional party company. The professional party company is not to promote the event on behalf of the chapter.</li> <li>• Only non-cash prizes can be offered at individual values under \$500.</li> </ul> <p>The chapter bears responsibility to research and follow all applicable gambling and tax law and provide proof of such to the s/p/d chapter <i>prior</i> to the announcement of the event.</p>	<p><b>Casino/Bingo Events</b></p>
<p><b>**Before beginning any fundraising activity, review the <a href="#">General Fundraising Policies</a>**</b></p> <ul style="list-style-type: none"> <li>• Participation Requirements Determined by Sponsoring Company <ul style="list-style-type: none"> <li>○ May be asked to provide proof of IRS status – Section 501(c)(3), meaning charitable, or Section 501(c)(4), meaning nonprofit (but not charitable). Local and s/p/d chapters are all 501(c)(4). If the sponsoring company requires proof of charitable or 501(c)(3) status, P.E.O. chapters cannot participate.</li> <li>○ Other requirements for participation may determine the chapter’s ability to enroll.</li> </ul> </li> <li>• Requires Approval from the P.E.O. Executive Office</li> </ul> <p>Due to complexity and variety of these programs, please contact the P.E.O. Executive Office to request approval for participation.</p>	<p><b>Scrip Programs</b></p>

## S/P/D CONVENTION INFORMATION

Sections below applying to in-person (“IP”) or virtual (“V”) conventions are indicated with an “IP” or “V,” respectively.

- Sales by hostess chapters and/or the s/p/d chapter shall be limited to items sold to help defray convention costs. Sales other than those limited to help defray the cost of convention could jeopardize the tax-exempt status of the P.E.O. Sisterhood. Laws relating to retail sales vary greatly in states, provinces, districts and communities and are to be observed. (IP, V)
- Within the limitations mentioned above, silent auctions may be held during in-person conventions, offering no more than three items, each with a value not to exceed \$500. Bids must be posted at the convention site and the winner announced prior to the close of convention. (IP)
- In addition to items sold to defray the cost of convention, a s/p/d chapter may sell P.E.O. related items such as s/p/d history, s/p/d chapter directory or commemorative item(s) for a significant anniversary of the s/p/d chapter. (IP, V)
- With the approval of the s/p/d executive board, local chapters may advertise their fundraising items with descriptive sheets available in the following manner:
  - Placed in convention kits (IP, V)
  - Included with the convention mailing (IP, V)
  - Sent with the s/p/d newsletter (IP, V)
  - Placed on the s/p/d website (IP, V)

Note: Samples of fundraising items may be displayed with order forms available; however, no sales are permitted at convention. (IP, V) Preordered and prepaid items may be delivered at convention. (IP)

- The hostess s/p/d chapter(s) for Convention of International Chapter may sell International Convention commemorative items at s/p/d convention the year of and the year after that Convention of International Chapter. (IP, V)
- Raffles held in conjunction with state and district conventions are not permitted due to liability concerns. Many state and district jurisdictions have restrictions with any “gambling” activity, particularly those that are held in hotels where alcohol is available. There are other legal restrictions about raffles being held in educational institutions and on college campuses. These restrictions regarding raffles have been adopted to avoid the potential liability for state and district chapters. (IP, V)
- Raffles at in-person provincial conventions may be permitted only with the approval of the provincial board and with the assurance that all local regulations are followed and any necessary permits are obtained. Though Canadian regulations allow more flexibility for these events at conventions, it is the responsibility of the provincial board to review and approve such fundraisers. (IP)

### Sale of Items at Convention

<ul style="list-style-type: none"> <li>• Local and s/p/d chapters may solicit sponsors to underwrite fundraising activities and events and programs related to convention. Sponsorship may be made in the form of, but not limited to, cash contributions, prizes, advertising, invitations, gift certificates, meals, supplies or other related items. (IP, V)</li> <li>• Selection of sponsors should be in keeping with the image of P.E.O. and should be tasteful and appropriate. Sponsors may receive recognition in programs, kits and news releases at the event or at convention. Sponsor recognition shall be limited to company name and/or logo. No endorsement or advertising of company services or products is allowed. (IP, V)</li> <li>• Sponsors should be notified that while donations may be used to support the philanthropic projects of the P.E.O. Sisterhood, local and s/p/d chapters are not allowed to issue tax receipts. In other words, donations from sponsors do not qualify for a charitable deduction. (IP, V)</li> <li>• Questions regarding these guidelines should be directed to the director of finance/treasurer of International Chapter. (IP, V)</li> </ul>	<p><b>Sponsorship of Local &amp; S/P/D Chapter Events &amp; Convention Hostess Chapters</b></p>
<ul style="list-style-type: none"> <li>• Hostess chapter groups must use the IRS number of their state or district chapter for all bank accounts. Adequate records should be maintained so that the amount held for the group is easily distinguished from the funds of the “holding” chapter. (IP, V)</li> <li>• Because the IRS will consider these funds assets of the state or district chapter, an annual accounting must be submitted in order to combine them with other state/district funds. At annual report time, the income, expenses and account balances must be reported to the treasurer of each state or district chapter using Form IRS-HC. The report should clearly identify the hostess group, including contact information for those responsible. (IP, V)</li> <li>• Although hostess group funds are held by a group of local chapters, the federal identification number determines ownership. By using the state’s tax identification number, the state or district officers assume responsibility for oversight and reporting. Annual reports (Form IRS-HC) from each hostess group should be submitted annually with the Annual Summary of Treasurer of State Chapter (Form IRS-SC) to the International Chapter treasurer’s office. (IP, V)</li> </ul>	<p><b>Hostess Groups for State or District Conventions</b></p>

## LOCAL CHAPTERS IN NON-CHARTERED TERRITORY

<ul style="list-style-type: none"> <li>• If bylaws and standing rules have not been amended during the year, the recording secretary of a chapter in non-chartered territory shall send an email or postcard in March to the organizer of International Chapter indicating “no change.”</li> <li>• If bylaws and standing rules have been amended during the year, the recording secretary of a chapter in non-chartered territory shall send a complete set of bylaws and standing rules to the organizer of International Chapter in March highlighting the changes made.</li> </ul> <p>Note: Any formal action by convention which requires a change to local chapter bylaws and standing rules shall be made without a chapter vote (e.g., dues increase). The mandated change will require that bylaws and standing rules be sent to the organizer of International Chapter.</p>	<p><b>Bylaws &amp; Standing Rules</b></p>
<ul style="list-style-type: none"> <li>• Delegate             <ul style="list-style-type: none"> <li>○ One delegate from every three local chapters or major fraction thereof in each non-chartered geographical area (e.g., state, province, territory) shall be elected. Designation of chapters entitled to elect a delegate shall be made by the organizer. Representation shall be on a rotating basis determined by the organizer. The president or a past president of the chapter shall be elected delegate when feasible.</li> </ul> </li> <li>• Expenses             <ul style="list-style-type: none"> <li>○ International Chapter will reimburse for one meal and pay expenses for housing for one extra night in advance of convention for delegates representing chapters in non-chartered territory.</li> <li>○ Transportation is paid by the chapter(s) the delegate(s) represent.</li> </ul> </li> </ul>	<p><b>Convention of International Chapter</b></p>
<ul style="list-style-type: none"> <li>• Chapters in non-chartered territory shall send annually two copies of their yearbook to the organizer of International Chapter.</li> <li>• Reciprocity groups and P.E.O. Groups in non-chartered territory shall send annually one copy of their yearbook or schedule of meetings to the organizer of International Chapter.</li> </ul>	<p><b>Yearbooks</b></p>
<ul style="list-style-type: none"> <li>• Each local chapter in Hawaii will be required by state law to pay an excise tax on all fundraising revenue. The P.E.O. Executive Office will prepare and file all necessary tax forms. Do not file any forms on behalf of your chapter or contact the Hawaii State Department of Revenue. Direct any questions to the Director of Finance/Treasurer of International Chapter, P.E.O. Executive Office.</li> <li>• The excise tax spreadsheets, sent to chapter presidents by email from the P.E.O. Executive Office, must be completed between March 1-15 and September 1-15 each year and returned by email to the executive office by the deadline.</li> </ul>	<p><b>Excise Tax – Only for Chapters in Hawaii</b></p>

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## EXHIBIT A

### PROCEDURE FOR SECURING CHANGE IN LOCATION OF A LOCAL CHAPTER OF THE P.E.O. SISTERHOOD

1. A proposal for change in location of a local chapter shall be presented at a meeting of the chapter to be voted upon at the next meeting.
2. At the next chapter meeting the chapter will vote (requires a favorable vote of 2/3 of members present). If the motion vote is favorable, those voting pro shall sign the petition. The completed petition (**Exhibit B**) is sent to the s/p/d president. If the vote is negative, the petition is not signed by the member(s) voting pro but the remainder of the report is completed and sent to the s/p/d president.
3. The executive board of the s/p/d chapter shall act upon the petition by a vote of the s/p/d executive board.

Following the favorable vote of the executive board of the s/p/d chapter, the president shall:

- Notify the executive director of action taken and date on which the change in location shall become effective by sending the Petition of Local Chapter for Change in Location of Chapter Designation.
  - Notify the president of the local chapter of action taken by the executive board of the s/p/d chapter, including the effective date of change of location (the date the s/p/d executive board voted on the change).
4. Upon receipt of the notification from the s/p/d president, the executive director shall:
    - Prepare and send the completed certificate to the president of the s/p/d chapter with a letter of instructions for proper signatures and seal and a statement of the amount of the required fee of \$15.
    - Send copies of the letter to the secretary of the s/p/d chapter and president of the local chapter.
    - Notify the P.E.O. Membership Department.
  5. The treasurer of the local chapter shall forward payment of the fee to the executive director.
  6. At the next s/p/d convention, an announcement is made of the change in location of a local chapter(s).

**EXHIBIT B**

**PETITION OF LOCAL CHAPTER  
FOR CHANGE IN LOCATION OF CHAPTER DESIGNATION**

P.E.O. SISTERHOOD

\_\_\_\_\_, \_\_\_\_\_  
(Date Petition Submitted)

The following members of Chapter \_\_\_\_\_, City of \_\_\_\_\_,  
S/P/D of \_\_\_\_\_, request permission to change the name of  
Chapter \_\_\_\_\_, City of \_\_\_\_\_, S/P/D of \_\_\_\_\_,  
to Chapter \_\_\_\_\_, City of \_\_\_\_\_, S/P/D of \_\_\_\_\_,

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Number of active, resident members of Chapter \_\_\_\_\_  
Request for Change in Location of Chapter voted on \_\_\_\_\_  
(Date)

Number of members Present \_\_\_\_\_  
Number of members voting Pro \_\_\_\_\_  
Number of members voting Con \_\_\_\_\_

(This requires a favorable vote of  
two-thirds (2/3) of the members present)

Date charter was granted: \_\_\_\_\_  
(month) (day) (year)

Date chapter was organized: \_\_\_\_\_  
(month) (day) (year)

\_\_\_\_\_  
Local Chapter President

\_\_\_\_\_  
Local Chapter Recording Secretary

Effective date\* of change of location: \_\_\_\_\_  
\*Date s/p/d executive board voted on this request (month) (day) (year)

\_\_\_\_\_  
S/P/D President

## EXHIBIT C

### P.E.O. GENERAL LIABILITY INSURANCE

**For P.E.O. meetings or functions held in a member's home  
or at a local church, community hall or private facility**

#### **What Does This Coverage Protect?**

This coverage protects P.E.O. (International Chapter, state and local chapters, members, officers and employees) from liability, i.e., bodily injury to a third party or damage to property belonging to a third party caused by negligence.

#### **Key Word – Negligence**

If, for instance, a member or guest slips and falls while attending a P.E.O. function, coverage only applies if there is negligence on the part of P.E.O., its member, employee or officer, such as allowing a *known* hazard or unsafe condition to exist. For this reason, all incidents of injury to persons or damage to property should be reported. A determination as to possible negligence will be made when necessary. Instructions and phone numbers for doing this are found on the Claims Reporting Statement, which is held by each state and local chapter president.

In such circumstances, P.E.O., its member, employee or officer is protected and would be defended against any resulting lawsuit.

#### **Medical Expense Coverage**

In addition to the liability portion of the coverage, the policy also provides a limited amount of “Medical Expense” coverage. This coverage can be used to pay the medical expenses of the injured party but this coverage is available only to guests or members of the public and *does not apply to P.E.O. members*. The Medical Expense coverage applies regardless of negligence (meaning, the P.E.O. does not have to be liable for the injury in order for this coverage to apply). However, the injured party should first look to his or her own medical insurance for reimbursement of medical expenses.

Incidents of the kind discussed in the foregoing, if occurring in a member's home, should also be reported to the homeowner's insurer, as similar coverage usually exists there. Under the “medical expense” portion of the homeowner's insurance, the P.E.O. member probably has coverage.

#### **Event Held at Establishment Selling Liquor**

If an event is held in an establishment that is in the business of selling liquor, it is the responsibility of the establishment to maintain Liquor Liability insurance. It is also up to the establishment to determine who to serve, and more importantly, who not to serve.

Under no circumstance may a P.E.O. chapter, reciprocity or other group of chapters obtain a liquor license.

#### **Auto Liability**

Members driving their own cars to pick up and transport participants to a meeting or event must rely on their own automobile liability insurance for their protection.

#### **COVID-19 Claims**

As a result of the COVID-19 pandemic, an exclusion has been added to P.E.O.'s insurance policy for injuries caused by “biological agents,” which is defined to include: viruses, pathogens, fungi, mold, mildew, and other microorganisms. This exclusion means that any claims that arise as a result of a “biological agent” (including, but not limited to, COVID-19) would **not be covered** by P.E.O.'s insurance policy.



## INSURANCE CERTIFICATE REQUEST FORM

All P.E.O. meetings and functions are covered by International's General Liability Insurance policy. Please complete this form for a facility requesting a proof of Liability Insurance Certificate.

*The Certificate of Insurance will be sent directly to the facility contact that you have named. The chapter contact will also receive a copy. Please refer to the explanation of P.E.O. International's General Liability coverage and how it applies.*

**Note: International's Liability Insurance Policy renews every year on July 1. Requests for functions scheduled after this date will be processed after the renewal occurs.**

### EVENT INFORMATION

Title of Event: \_\_\_\_\_

Chapter: \_\_\_\_\_ Date of Event: \_\_\_\_\_

Name of location or facility where event is to be held: \_\_\_\_\_

Does the event involve physical activity (ex. Walking or running program, etc.)?  Yes  No

If Yes, please have participants complete the Waiver & Release of Liability form included.

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Name & Title of Contact Person or Facility: \_\_\_\_\_

**ADDITIONAL EVENTS:** Please complete all information above for each event. (Extra sheet included)

### PERSON MAKING REQUEST

Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

P.E.O. Chapter Letters: \_\_\_\_\_ Chapter City: \_\_\_\_\_

Send requests to:

P.E.O. Executive Office  
Attn: Insurance Certificate Request  
3700 Grand Avenue  
Des Moines, IA 50312

[jtracy@peodsm.org](mailto:jtracy@peodsm.org)

Fax: (515) 255-3820

**INSURANCE CERTIFICATE REQUEST**  
**ADDITIONAL EVENTS**

**EVENT (2)**

Title of Event: \_\_\_\_\_

Chapter: \_\_\_\_\_ Date of Event: \_\_\_\_\_

Name of location or facility where event is to be held: \_\_\_\_\_

Does the event involve physical activity (ex. Walking or running program, etc.)?  Yes  No

If Yes, please have participants complete the Waiver & Release of Liability form included.

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Name & Title of Contact Person or Facility: \_\_\_\_\_

**EVENT (3)**

Title of Event: \_\_\_\_\_

Chapter: \_\_\_\_\_ Date of Event: \_\_\_\_\_

Name of location or facility where event is to be held: \_\_\_\_\_

Does the event involve physical activity (ex. Walking or running program, etc.)?  Yes  No

If Yes, please have participants complete the Waiver & Release of Liability form included.

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Name & Title of Contact Person or Facility: \_\_\_\_\_

**EVENT (4)**

Title of Event: \_\_\_\_\_

Chapter: \_\_\_\_\_ Date of Event: \_\_\_\_\_

Name of location or facility where event is to be held: \_\_\_\_\_

Does the event involve physical activity (ex. Walking or running program, etc.)?  Yes  No

If Yes, please have participants complete the Waiver & Release of Liability form included.

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Name & Title of Contact Person or Facility: \_\_\_\_\_

## INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) GLOSSARY OF TERMS AND ABBREVIATIONS

<ul style="list-style-type: none"> <li>• Abbreviation for International Chapter of the P.E.O. Sisterhood.</li> </ul>	<b>IC</b>
<ul style="list-style-type: none"> <li>• Reference to the Membership Department in the P.E.O. Executive Office: <a href="mailto:membership@peodsm.org">membership@peodsm.org</a> OR Membership Department P.E.O. Executive Office 3700 Grand Avenue Des Moines, Iowa 50312-2899</li> </ul>	<b>Membership Dept.</b>
<ul style="list-style-type: none"> <li>• Abbreviation for “State/Provincial/District” Chapter or “state/province/district.”</li> </ul>	<b>s/p/d</b>
<ul style="list-style-type: none"> <li>• The P.E.O. Member ID # is the official method for identifying P.E.O. members.</li> <li>• Seven-digit P.E.O. Member ID # locations listed below: <ul style="list-style-type: none"> <li>○ Chapter Membership Summary</li> <li>○ Back cover of the P.E.O. Record above member’s address</li> <li>○ Member ID Search on the P.E.O. International member website</li> <li>○ Letter from Membership Dept providing new initiate’s Member ID # (sent to chapter within 30 days after receipt of Member Update form reporting initiation)</li> </ul> </li> </ul>	<b>Member ID #</b>
<ul style="list-style-type: none"> <li>• Term used by the chapter to which a member has transferred.</li> </ul>	<b>Transfer In</b>
<ul style="list-style-type: none"> <li>• Term used by the chapter from which a member has transferred.</li> </ul>	<b>Transfer Out</b>
<ul style="list-style-type: none"> <li>• Process of an inactive member becoming an active member.</li> </ul>	<b>Reinstatement</b>
<ul style="list-style-type: none"> <li>• Member who signs the Sponsor for Membership form proposing a woman for P.E.O. membership.</li> </ul>	<b>Sponsor</b>
<ul style="list-style-type: none"> <li>• An active nonresident member shall be one who resides outside the city or town in which the chapter is located, at a distance which makes impracticable her attendance at meetings of the chapter. Her name may be placed on the nonresident list. The member shall have all the privileges of the Sisterhood.</li> </ul>	<b>Nonresident Member</b>
<ul style="list-style-type: none"> <li>• Letter received by the local chapter corresponding secretary from the s/p/d secretary or paid assistant indicating approval of the Annual Report of Corresponding Secretary (ARCS). This letter includes the final numbers for active and inactive members for that local chapter.</li> </ul>	<b>Annual Report Release</b>
<ul style="list-style-type: none"> <li>• An active member who lives in your community but belongs to a chapter in another area.</li> </ul>	<b>Unaffiliate</b>

## INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) GLOSSARY OF FORMS

<ul style="list-style-type: none"> <li>• Form sponsors sign when presenting &amp; proposing a name for membership.</li> </ul>	<b>Sponsor for Membership</b>
<ul style="list-style-type: none"> <li>• Form used by a local chapter to invite a member to transfer.</li> </ul>	<b>Invitation to Transfer</b>
<ul style="list-style-type: none"> <li>• Form used to report all membership activity during the year to the Membership Department.</li> </ul>	<b>Member Update</b>
<ul style="list-style-type: none"> <li>• Replaces the chapter General Enrollment Book.</li> <li>• Lists all P.E.O.s who have been a chapter member since 1980. Any members not listed are those who transferred out or died prior to 1980 – information about these members may be found in the retired General Enrollment Book.</li> </ul>	<b>Chapter Membership History (CMH) Record</b>
<ul style="list-style-type: none"> <li>• Serves as reference document for annual reports (update is sent each year).</li> <li>• Represents members who were living during fiscal year and membership activity during year, i.e., Initiation, Transfer in, Death, Reinstatement, Change of Name, Change of Address, Change of Email Address.</li> <li>• Used during year to record <b>decreases in membership</b>.</li> </ul>	<b>Chapter Membership Summary (CMS) Record#</b>
<ul style="list-style-type: none"> <li>• Annual Report used to record all membership changes not indicated on the Chapter Membership Summary, including updates on inactive members, and to record membership totals (active and inactive members) as of March 1.</li> <li>• Used during year to record <b>gains in membership</b>.</li> </ul>	<b>Annual Report of Corresponding Secretary (ARCS)</b>