Corresponding Secretary Guidelines

Seven Primary Tools for your office:

1. **P.E.O. International website** – www.peointernational.org

2. **P.E.O. Constitution – 2019** red cover – Your chapter received 3 copies, additional copies may be ordered from the P.E.O. Supply Department.

3. **Instructions to Officers of Local Chapter (IOLC):** The Corresponding Secretary and Policies sections may be printed, downloaded to your computer/tablet or accessed online. The IOLC includes a retention record, a table explaining the forms you will use, instructions on reporting to the chapter, the process for reporting and recording increases and decreases in membership, election reporting, annual reports and a flow chart describing the processes for transfers and reinstatements. The Policies section is where you will find P.E.O. policies pertaining to the activities of local chapters.

4. **List of Supplies for Officers of Local Chapter.**
   a. The *Invitation to Membership and Invitation to Transfer* are ordered from the P.E.O. Supply Department.
   b. Online forms required for the office are available on the P.E.O. International website under Resource Library > Local Chapter Officer Resources > Corresponding Secretary Forms, including a digital fill and print version of the *Invitation to Transfer.*
   c. Annual report items are found on the International website under Resource Library > Local Chapter Officer Resources > Annual Reports.
   d. Always download and use the most recent version of forms. Do not keep outdated blank copies in your files.

5. **Online training:** The training video for your office is titled Corresponding Secretary: Staying in Touch! You may print a copy of the script for reference.

6. **Online forms** peointernational.org > Resource Library > Local Chapter Officer Resources > Corresponding Secretary Forms for Annual Reports.
   a. Change in Membership (CIM) (also under the Membership Tab)
   b. Notice of Member in Your Area
   c. Annual Report of Corresponding Secretary (ARCS)
   d. Local Chapter Report of Project Chairmen
   e. Report of Elections of Officers of Local Chapters
   f. International Convention-Nominee for Delegate
   g. State Convention Delegates and Alternates

7. **President’s Book.** Instructions regarding the monthly report of the corresponding secretary and reading of correspondence are found here.
Corresponding Secretary Duties

Your primary duty is to maintain accurate records of the membership of your chapter. Much of the work of the corresponding secretary involves timely submission of online forms and reports. If you are not comfortable with the computer, your technology contact can assist you with these duties. Please remember time is of the essence.

P.E.O. CONSTITUTION (Part III, Article V, Section 5) lists your duties. The principle duties involve chapter membership, including maintenance of the chapter membership records, as well as conducting the correspondence of the chapter.

ASC BYLAWS AND STANDING RULES (Article X, Section 2C) lists additional duties:
To submit an electronic or printed copy of your chapter yearbook by September 1.
To submit the Report of Local Chapter Project Chairman online on the P.E.O. International website by May 15.

Process Forms for Membership

1. IOLC
   a. Corresponding Secretary, page 2. Forms and Process for Membership Activity. This table specifies what needs to be done for every type of membership activity: what action is to be taken, what form to use, where to send the form and what information to confirm before submitting the form.
   b. Corresponding Secretary, page 10. Flow Chart – Transfer, Reinstatement and Transfers & Reinstatements lists the steps for these three membership events.

2. Change in Membership form (CIM)
   a. This form is used to notify the P.E.O. Membership Department of most membership activity that occurs in the chapter during the year. It is important to submit this form online in a timely manner to ensure that our membership records are accurate.
   b. You will need your Member ID# to use the form. Unless you are reporting a new initiate, you will also need the Member ID # of the sister for whom you are recording a change.
   c. Don’t forget to hit “continue” and then “submit” when you are finished. You will get a confirmation page when the information has been entered and submitted correctly.

Initiates: When reporting a new initiate, always report her name as she signed it in the President’s Book. Chapters may initiate new members at any time during the year, including February.

Transfer In: When a new member transfers, the date of the “transfer in” is the date of the regular business or special meeting at which the letter accepting the invitation is read. If the acceptance letter is not read at a meeting before February 1, the member must pay her dues to her former chapter. No transfer membership business may be completed in the month of February.
  • Chapter votes to invite member to transfer; corresponding secretary sends invitation.
  • Invited member sends acceptance letter.
  • Corresponding secretary reads the letter at the next chapter meeting.
  • Corresponding secretary submits the Change in Membership form online.
  • P.E.O. Membership Department notifies former chapter by letter of transfer out of member.
Reinstatement:
• Inactive member notifies chapter by mail or email that she wishes to reinstate. She sends a $35 check to the chapter for her reinstatement.
• When both notification and check have been received, corresponding secretary reads the letter of reinstatement at the chapter meeting.
• Corresponding secretary submits the Change in Membership form online.
• Treasurer issues Membership Card to member.

Reinstatement and Member Transferring In:
• Chapter votes to invite inactive member to transfer; you send an invitation with instructions to submit the $35.00 fee.
• Transferring member sends acceptance letter with $35 reinstatement fee to inviting chapter.
• Corresponding secretary reads the acceptance letter at the next chapter meeting and gives $35.00 fee to treasurer for processing.
• Corresponding secretary submits the Change in Membership form online; treasurer issues Membership Card to member.

Deaths are reported on a CIM for both active and inactive members. If the date of death is not known, use 11/11 of the current year. If only the year is known, use 11/11 of that year.

Name, Address and other contact changes for active or inactive members may be submitted on the CIM. Members can also submit their own change of address, telephone number or email address online, by calling or using the form on the back of The P.E.O. Record.

2. Historical Membership Records
   a. General Enrollment Book
   All but those chapters organized after March 1, 2010, will have a General Enrollment Book. This book is a record of your chapter’s membership history from its organization to 2010. It is to be kept for the life of the chapter. Do not record new entries in this book. It was retired in 2010 and replaced by the Chapter Membership History form.

   b. Chapter Membership History (CMH)
   • The Chapter Membership History is a hard copy printout provided by your state officers, which lists all P.E.O.s who have ever been members of your chapter, except those who were deceased prior to 1980. The General Enrollment Book remains the source for the information concerning those departed sisters.
   • **No entries are made to the CMH or the General Enrollment Book.** They serve solely as your chapter’s historical record of membership. An updated copy of the CMH is available from the Membership Department or a state officer, every 5 years, upon request. State officers have been providing an updated CMH to chapters during official visits.
Recording Changes in Membership:

1. Decreases in membership: Use the Chapter Membership Summary (CMS)
   - This is a reference document provided in hard copy by the International Membership Department. The CMS includes only chapter members, active and inactive, who were living during the past P.E.O. fiscal year (March 1 to February 28/29).
   - In January or February, you will receive a new, updated CMS with the annual report package, which is sent to your chapter’s president. Verify that the updated CMS includes the details of all the membership activity in your chapter that has been reported during the year--initiations, transfers in and transfers out, deaths, reinstatements and changes in name or address.
   - The final page of the CMS gives totals for your chapter membership that have been reported during the year as of the date the report was run. Because International runs the CMS report and prints it before the P.E.O. year is completed, you may have some activity that was or will be reported for the year after the new CMS is run. You still submit a Change in Membership form as appropriate, but you also will need to report this activity on the Annual Report of the Corresponding Secretary. **Note: The CMS is **NOT** sent to the state secretary with your annual report.**

2. Increases in membership: Use the Annual Report of the Corresponding Secretary (ARCS). The Annual Report of the Corresponding Secretary is a blank form provided by the International Membership Department each year with the annual report package. This blank form is also available in the Annual Reports section of the International website.
   - The ARCS functions:
     a. When completed and submitted to the state secretary by March 10 each year, it is the official year-end annual report representing your chapter’s membership. Do not repeat any changes already recorded. It is best practice to submit a CIM for address, phone and email changes.
     b. Inactives and Lost Contacts are reported on the ARCS at this time. To be considered a Lost Contact, she must have been inactive for 25 years AND no one knows of her whereabouts. Report lost contact the last day of February of this year.
     c. During the ensuing year, it is to be used to record gains in membership for your chapter.

At the Chapter Meeting
Stand if you are able when reading the Report of Corresponding Secretary and the correspondence.
1. **Monthly Report of the Corresponding Secretary**
   Give this at the first business meeting of the month. It **covers only correspondence sent, not correspondence received**. Date your report the day of the meeting. The report itself is self-explanatory. Read the report and give it to the recording secretary for inclusion in the minutes. She destroys the report after the minutes for that meeting have been approved.

   Correspondence that you send will include the following:
   - Activity submitted to International on the online Change in Membership form.
   - Notice of Member in Your Area form
   - Invitation to Membership
   - Invitation to Transfer Correspondence the president may direct you to send, such as thank you notes or sympathy cards from the chapter, invitations to events, congratulations to project recipients.

2. **Reading the Correspondence**
   Correspondence received is read at every business meeting. After reading it, give all correspondence to the recording secretary so she may correctly record names and subject matter in the minutes.
   - State the name of the sender before reading the text.
   - A letter of acceptance for an invitation to transfer and/or a letter of reinstatement is **read as the last item of correspondence because the president must act on it**.
   - The date the acceptance and/or reinstatement letter is read to the chapter is noted as the official “transfer in” or “reinstatement” date when submitting the online CIM form.
   - **Do not read a reinstatement letter unless the reinstatement fee has been received.**
   - When a member transfers to another chapter, the P.E.O. Membership Department will send a letter to her previous chapter as notification of this transfer. When received, this notification letter must be read at the next regular business meeting. The “transfer out” date, which is indicated in the notification letter, is to be recorded on the Chapter Membership Summary.
   - Following successful completion of annual reports you will receive a **release letter** from the state secretary. Read the letter to your chapter noting the final membership count. **Retain this letter for 6 years.**

**End-of-year Reports**
Tasks that must be completed at the end of the P.E.O. fiscal year include:
- Complete and send the Annual Report of Corresponding Secretary (ARCS) to the state secretary by March 10.
- Report (online) the election of officers of local chapter after installation at the **first meeting in March**.
- Report (online) the election of delegate and alternate for state convention after election in **February or March**.
• Report (online) the nomination of delegate and alternate to Convention of International Chapter if your chapter is entitled to send a delegate after election in **February or March of odd years**.
• Submit (online) **Report of Project Chairman of Local Chapter no later than May 15.**

**Annual Report of Corresponding Secretary (ARCS)**

In January or February, International sends an annual report packet to your chapter president. Included in the packet are an updated CMS, a blank Annual Report of Corresponding Secretary form and instructions. **Do not complete the ARCS until March 1** and send it to the state secretary postmarked no later than March 10.

**Steps to complete the ARCS:**

1. Report the following on the ARCS form:
   a. Membership activity that occurred during the past fiscal year, but is **not** recorded on the updated CMS received in the annual report package. Compare the information on the new CMS to the increase/decrease information and name and address changes you have recorded on the CMS and ARCS during the year. If there are discrepancies, enter the correct information on the blank ARCS form.

   Missing information on the CMS indicates a CIM was not received or recorded by the International Membership Department as of the date the CMS was printed. Consequently, the membership activity must be entered on the ARCS to ensure that International’s records are updated appropriately. **Submit a CIM for missing information.** Contact the ASC secretary or your board buddy if you have questions.

   b. Members who did not pay their dues before March 1 are now considered **inactive. Inactive members are only reported on the ARCS**, even if you were notified of their intentions earlier in the year as her dues are paid until the end of the P.E.O. year. They are never reported on a Change in Membership form (CIM).

   c. Report any Lost Contacts. (see explanation on page 4)

   d. Updates to members’ contact information not shown on the new CMS, including reinstatements and deaths, should be submitted on a CIM.

2. Validate your chapter’s membership totals with your treasurer, including reinstatements and initiations from March 1 to present. The corresponding secretary and treasurer totals must agree. Please review names as well so that you both have the same active members shown.

3. Once your numbers and names are reconciled with those of the treasurer, you and the outgoing chapter president sign the ARCS.

4. Make two copies of the signed form.
   a. Keep one copy. Use this to record increases in membership during the ensuing year.
   b. Send the **original** and the second copy to the state secretary. **Postmarked no later than March 10.** If not post marked by March 10th it will have to be overnighted per International Chapter.
Annual Release Letter

The annual release letter is an emailed letter sent from the state secretary to each local corresponding secretary confirming approval of the ARCS. This letter includes the final number of active and inactive members in your chapter. The Annual Release Letter must be retained for six years. Upon receipt of your release, destroy the Chapter Membership Summary from the prior year. Retain the CMS sent with the current year’s annual report mailing (dated January of the current year). You will use this form to record changes in membership during the ensuing year.

1. **Chapter Yearbook Submission.** Facilitate the submission of an electronic or printed copy of the chapter’s yearbook to the designated ASC members prior to September 1. The yearbook requirements and the addresses of the designated ASC members are posted post-state convention on the ASC website. Refer to the ASC Bylaws: Article X, Section 2, Part C: Corresponding Secretary.

2. **Notice of a Member in Your Area Form.** When a sister moves too far away to attend meetings of your chapter regularly, send a Notice of Member in Your Area Form to the organizer in the state where she resides. The organizer will be able to research chapters with members who live in her zip code. You can also send the form to chapters in her new community. To find addresses of presidents of local chapters or s/p/d officers, peointernational.org > Resource library > Listings and Directories > Directory of Presidents.

Before Leaving Office

1. **Review your files according to the Retention Record in the IOLC, Corresponding Secretary, page 1.** Retain the items you are required to keep in an organized manner. Destroy items as directed in the retention record. Reach out to your Board Buddy if you are unsure of what to do.

2. **Following your release from the state secretary, deliver your supplies and files, and TRAIN your successor on the duties and responsibilities of the office.** Remember to review how to submit the online CIM.

**Corresponding Secretary Glossary**

ARCS – Annual Report of Corresponding Secretary

CIM – Change in Membership form (peointernational.org> login> membership tab)

CMS – Chapter Membership Summary (new each year)

CMH – Chapter Membership History (replaced during official visit)

P.E.O. year – 3/1/xx to 2/28-29/xx

Lost Contact – sister who has been inactive for 25 years and her whereabouts are unknown

Inactive – sister who did not pay annual dues by the last day in February