Welcome to this online training session for local chapter presidents and vice presidents. A printable copy of this script is provided at the end of the session to allow you to focus on the information being shared rather than taking notes. You will have continuous accessibility to this training session at any time of the day or night, as it will remain online in the “Local Chapter Online Training” section of the P.E.O. website.

This online training session will provide an effective orientation to how these administrative processes have been revised to assist in streamlining the work of the local chapter – specifically, changes in the role of the president and vice president. Some of the revisions are a matter of rearranging the order of the existing processes; others are complete changes.

Primarily, we are focusing on changes made in these five major categories:

1. Order of the Business Meeting
2. Sponsoring a Candidate
3. Balloting on a Candidate
4. Ceremony of Initiation
5. Membership Transactions (Transfers, Reinstatements)

It won’t come as any surprise to you, the president, that good leadership of a local chapter falls primarily and squarely upon you. And when the president is not available, it naturally falls to the vice president. Good leadership can take place most effectively when the leader feels confident, and realizes that she really is competent. There are two very key reasons why you should have confidence in you ability to lead: 1) you have all the tools needed to do the job well – you only have to become familiar with them – friendly, if you will; 2) there is a chapter full of your sisters who want you to succeed and will do anything they can to help – you only need to ask.

Let’s go ahead and add a third reason to your list: 3) you have at your disposal your state/provincial/district officers and International Chapter officers who are also very willing to help you not only succeed but enjoy the journey.

OK, let’s now focus directly on the changes we mentioned just a few moments ago:

**1. ORDER OF BUSINESS:** Four key tools with which you should become very familiar are the updated Constitution, the President’s Book, P.E.O. Counsel for Membership Booklet, and Instructions for Officers of Local Chapters (IOLC).
You will note in your President’s Book an updated Order of Business for your chapter meetings. The meeting will open with the Call to Order, Opening Ode, Objects and Aims and Devotions. The guard will have taken the password using one of the prescribed methods.

After the reading and approval of the minutes, the treasurer will report. Please note that the treasurer will make all of her reports at one time. She will need to be prepared to do roll call, give the monthly financial report and present bills to the chapter. Remind members to submit bills to the treasurer before the meeting so that she can present all bills in an organized manner for chapter approval.

Immediately following the treasurer’s reports, the corresponding secretary will give her report of what was sent and also will read correspondence received at this time. She will report only one time – all correspondence being sent from the chapter and all correspondence coming in.

Chapter business is next and will include committee reports, unfinished business and new business. Committee reports have been moved to a business item; if there is something on which the chapter should vote, it can take place following the committee report and on recommendation of the committee. It is helpful for the president to know which committees intend to make a report; a committee sign-in sheet made available prior to the meeting is recommended. The president will only call on the committees that have something to report to the chapter. Emphasize that committee meetings should be held outside of the business meeting and only a brief report should be given.

The next business in order is unfinished business. Unfinished business refers to questions that have carried over from the previous meeting where the business was not completed. The president should prepare the agenda for unfinished business from the previous meeting by reviewing the minutes with the recording secretary. If there is no unfinished business, the president moves on to new business. Any member can introduce a new item of business at this time.

2. SPONSORING A CANDIDATE: The “Sponsor for Membership” form is signed by three members attesting that they are well acquainted with the proposed candidate. The members sponsoring a prospective member must know her well so that the other members of the chapter feel comfortable “voting on faith” they have in these sponsoring sisters. The term “voucher form” is no longer used; the word “vouch” has been replaced throughout with “sponsor.”

A candidate name may be proposed at a “special” meeting as well as a regular business meeting. Items of business that may be conducted at a special called meeting are increasing for the chapter’s convenience. (See Appendix # 2 in the President’s Book)

The name of a lineal descendent may be proposed without the usual residency requirement of living in an area for six months or in a city that permits regular attendance at meetings. A lineal descendant is defined as a daughter, step-daughter, or granddaughter of a chapter member who is active or inactive, living or deceased.
3. **BALLOTING ON A CANDIDATE:** Please make note that the responsibility for balloting has been shifted to the chapter vice president and the process has been significantly streamlined.

First of all, balloting on a proposed candidate’s name is now less formal – more in keeping with today’s lifestyle. No more marching around the room to a ballot box. Balloting on a name proposed for membership is conducted in much the same manner as other types of balloting.

Let’s take it from the top. The procedure for balloting is fully outlined in Appendix # 16 in the President’s Book. The balloting process will go like this:

- The president asks the recording secretary to read the name(s) of the woman or women proposed and their sponsors (formerly referred to as vouchers).
- After the name(s) is/are read, the president may ask if a sponsor would like to tell the membership more about the candidate.
- The president asks the treasurer for the number entitled to vote.
- Hearing the number entitled to vote, the recording secretary makes a note of the number and provides ample ballots, pencils and a suitable container for balloting.
- The president announces that the **vice president** will distribute ballots and pencils.
- While the president reads the instructions for balloting, the vice president is distributing the ballots and pencils to the members who are still seated (remember – no more marching).
- The ballots being distributed are the familiar ballots pre printed with “pro” and “con”.
- The president instructs that members should rise after their ballot is cast and remain standing until the ballot is collected.
- Each member shall place her unfolded ballot face down in the container. **Note:** If a member needs help, the president will assist her.
- “The **vice president** will collect the ballots.”
- After casting her own ballot in the container, the vice president takes the container to the president and recording secretary for them to cast their ballots, and proceeds to collect the ballots of the remaining members.

The vice president will know exactly what to do and when because she will have become very familiar with Appendix # 16 – Balloting Procedure – provided for her use. After the vice president collects the ballots, she presents the container with the cast ballots to the president and recording secretary. After the president and recording secretary determine the vote, the recording secretary places the ballots in an envelope to be destroyed after the meeting.

The Balloting Procedure provides what to do in the event of a con vote or if another vote is to be taken for additional candidates. Those instructions are also in the President’s Book and IOLC.
The response of the president, made in the event of a second unfavorable ballot, has been expanded to include an explanation of the process under which the name may be re-presented in six months.

This method of balloting saves time in the business meeting and there is no ballot box to be carried from meeting to meeting. The only description of the container to be used for balloting is “a suitable container.” The definition of “suitable” is a judgment made at the location. It would be a good idea for the president to alert the hostess ahead of time that a “suitable container” will be needed that day for balloting. The ballot, under the new process, will still be a “confidential” one.

4. CEREMONY OF INITIATION: There are options with regard to the Ceremony of Initiation. As the amendment was adopted, officers are expected to memorize the Ceremony of Initiation (COI) or, at the discretion of the chapter, read the ceremony from an officially printed booklet. The officially printed booklet is provided through the executive office; it is the only booklet from which officers are at liberty to read.

Notice, the option is “at the discretion of the chapter” – not the discretion of the president or any other officer...the discretion of the chapter. If the chapter opts to continue with memorization, it will be expected that all members of the initiation team will memorize their parts. If the chapter opts for using the officially printed booklet, all of the officers or officers pro-tem will hold a booklet, even if some of the officers choose to recite from memory. The appearance must be a uniform one. An exception is made for the one acting as president who has memorized the part.

Some may think the option of using the booklet means the chapter won’t have to rehearse before an initiation. That would be a false assumption! Do we enjoy listening to someone read who doesn’t sound like they are interested in what they are reading, or who stumble over the words and don’t seem to pay attention to how they fit together? Neither will a candidate enjoy such a performance. It will be just as important to have practices in order to read as if the words and phrases are familiar, as if they are being said directly to the candidate, words with which the speaker is sufficiently familiar that they can look up at the candidate rather than looking down at the book all during the speaking part. It will take some practice to become adept at handling the booklet and the ribbon at the same time. Yes, practice time will be as important as ever.

Be assured that with the proper amount of attention on the part of each participant, the Ceremony of Initiation will continue to be a beautiful part of our P.E.O. experience.

Another streamlining measure allows the chapter an option of initiating up to three candidates at the same time – in similar manner as when a new chapter is organized with multiple charter initiates. Two initiation placement diagrams are provided in the President’s Book illustrating ways to accommodate up to three initiates. Congratulations to any chapter who has the opportunity to initiate more than one candidate at a time!
5. MEMBERlSHIP TRANSACTIONS: It is important that the president and vice president have a clear
working knowledge of the process for membership transactions. The corresponding
secretary will ultimately be responsible for recording the transactions, but it will be critical that
you, as president, be familiar with the process and encourage promptness in reporting changes
on the Change in Membership form.

The dimit is now known as a TRANSFER IN or TRANSFER OUT of a chapter. The president should
be familiar with all requirements pertaining to transfers, with special reference to the order of
procedure for invitation to transfer and acceptance of a transfer as this is all a part of the Order
of Business.

A KEY POINT to remember in the transfer process is that an invitation to transfer may not be
extended or accepted in February. A P.E.O. remains a member of her current chapter until the
inviting chapter has accepted the transfer by reading her acceptance letter. The corresponding
secretary will record on the Annual Report of Corresponding Secretary form the date the
transfer was accepted.

So let’s review the transfer process:
- Chapter votes to invite member into chapter and sends invitation to transfer
- Invited member sends acceptance letter
- Reading acceptance letter at chapter meeting completes transfer
- Corresponding Secretary sends Change in Membership form to Membership
  Department
- P.E.O. Membership Department notifies member’s former chapter of transfer

The reinstatement process requires no vote of the chapter. It goes like this:
- Inactive member notifies by email or post that she wishes to reinstate
- Sends fee of $35.00 to chapter
- No chapter vote required – payment of fee completes reinstatement
- Corresponding Secretary records active status and sends “Change in Membership” form
to P.E.O. Membership Department
- Local chapter treasurer issues membership card to member

An inactive member may accept a chapter’s invitation to transfer if she indicates in her
acceptance letter that she is reinstating and includes her reinstatement fee in the new amount
of $35.00.

As the leader of your chapter and its executive board, please review the content of additional
programs that are available for other local chapter officers and committees. This will ensure
your familiarity with all changes that have been made to processes in the organization.

To summarize, we have reviewed how the work of the local chapter has been streamlined for
the president/vice president in these five major ways:
• **Order of Business**: The updated order groups actions together to eliminate confusion and allows more efficient use of time

• **Sponsoring a Candidate**: Sponsoring a candidate now requires only three signatures and remember - the former reference, voucher, is now known as sponsor

• **Balloting on a Candidate**: The balloting process has been shortened considerably, still maintaining confidentiality.

• **Ceremony of Initiation**: The chapter has two options for the Ceremony of Initiation – memorization or using an officially printed booklet. The chapter also has the option of initiating up to three candidates at one time. Again, a more efficient use of time.

• **Membership Transactions**: One of the greatest efficiencies in all of the streamlining measures is in the way transfers and reinstatements will be handled – fewer forms, less waiting time, much more efficient.

These are exciting times! Though it is more comfortable to stay in the groove we are accustomed to, we believe that streamlining some of our processes will be a benefit to you as leader and to your chapter. We trust you will find it so. Having taken the time to become really familiar with the role of the president and vice president through this training module, both your confidence and competence will be enhanced. You’re good to go!

Thank you for all you do for the P.E.O. Sisterhood and for taking advantage of this training session prepared for your benefit. We offer our best wishes to you and your chapter for a wonderfully fulfilling year!