CORRESPONDING SECRETARY: STAYING IN TOUCH

Thank you for reviewing the training session for corresponding secretaries of local chapters. This printable copy of the script is for your review and notes. You will have access to this training session at any time, as it will remain in the Resources section of the P.E.O. International website (https://www.peointernational.org).

Thank you for accepting this important office for your chapter. P.E.O. depends on the accuracy and timeliness of your records in order to maintain current and valid information about all of our members. During this training, we'll review the tools available to execute your responsibilities and also the forms and processes to be used when reporting membership activity.

Let's get started by first understanding what we will review as part of this presentation. We will discuss three areas.

1. Tools and tips for fulfilling your responsibilities: In this section, you will become familiar with the materials that are offered specifically for local chapter corresponding secretaries.
2. Membership records: Keeping track of our members is one of the most important duties of your office. This section will acquaint you with the key forms and records used to ensure our membership records are current and accurate.
3. Annual reports: By maintaining the electronic membership records throughout the year, completion of annual reports will be simplified.

First are the tools and tips available for corresponding secretaries. A key recommendation for all officers is to participate in an officer transition meeting soon after being elected or installed. Such a meeting will enable you to become proficient in your duties more quickly by providing “hands-on” instructions about your responsibilities and the materials available to you. If you haven’t had a transition meeting with your predecessor yet, please schedule one soon.

Three key tools with which you should become familiar are the P.E.O. Constitution, Instructions to Officers of Local Chapters, also referred to as IOLC, and your state, provincial or district (s/p/d) chapter bylaws and standing rules.

In the Constitution, the duties of a corresponding secretary are noted in Part III, ARTICLE V, Sec. 5. Detailed instructions for executing these duties are found in IOLC. The corresponding secretary section of IOLC includes a table that specifies what needs to be done for every type of membership activity – what action is to be taken, what form is to be used, where to send the form and what information should be confirmed before submitting the form. Both the Constitution and IOLC are available on the P.E.O. International website.

Nearly all of the forms required for your office are available in the Resources section of the P.E.O. International website.
Now that we’ve reviewed the tools available for corresponding secretaries, let’s discuss some tips for performing your duties. The **Corresponding Secretary’s Monthly Report to Chapter** is given **only** at the first regular meeting each month, **but** correspondence is read at every regular meeting. When reading correspondence, state the name of the sender before reading the text.

All electronic correspondence received by the corresponding secretary may be distributed to the entire chapter prior to the meeting. You would make reference to these in your report and read or review correspondence not received electronically.

Please provide correspondence requiring chapter action to the president.

For the monthly report, if no correspondence was sent and/or received, the appropriate report is “No correspondence was sent” and/or “No correspondence was received.”

Each year after you receive the release from the s/p/d chapter secretary or paid assistant, read the Annual Report to your chapter noting the final membership count. Report to your chapter the total number of active members, the number of members becoming inactive and any other membership changes.

When a member transfers to another chapter, the P.E.O. Membership Department will send an email to her previous chapter as notification of this transfer. When received, this notification letter must be read at the next regular meeting. The “transfer out” date, which is indicated in the notification letter, is to be recorded on the Membership Roster, which will be discussed later in this training.

It’s important to note that a letter of acceptance for an invitation to transfer and/or a letter of reinstatement is read as the last item of correspondence. Her reinstatement date is the date the reinstatement fee is received by the chapter. The receipt of the fee is usually considered the date it is presented to a chapter during a business meeting. For a combined reinstatement/transfer, the date the acceptance to transfer letter is read to the chapter is noted as the official “transfer in” date on the **Member Update** form and Annual Report. Please note a reinstatement letter should be read **only** when the reinstatement fee has been received. The Annual Report will be explained later in this session.

As we begin to discuss membership records, it’s important to note that the Member ID number is the only number used to track P.E.O. members. This slide indicates where Member ID numbers may be found on The P.E.O. Record. The glossary section of [IOLC](https://www.peo reconoc) outlines the additional ways to determine the Member ID number. These numbers are a critical component for all membership records, including annual reports, and they are required for ordering supplies and when registering for Convention of International Chapter. Member ID numbers can also be found by using the **Member ID Search** on the [P.E.O. International website](https://www.peo.org).

The following three documents are the core items used for tracking and reporting your chapter’s membership:

- **Member Update** form
- Chapter Membership History (CMH)
- Membership Roster

These documents are essential for maintaining accurate membership records. Details about each of these documents are provided in [IOLC](https://www.peo.org).
The **Member Update** form is used to notify the P.E.O. Membership Department of all membership activity in your chapter, **including a member’s change in name and/or address and/or email address**. This is the only form used for this purpose. It’s important to expediently submit this form to the Membership Department by using the [online form](#) to ensure our membership records are accurate. Before submitting the **Member Update** form to the Membership Department, it’s essential that the appropriate entries are made in your membership records.

If the P.E.O. Membership Department receives a change of address submitted directly by a member, a notification email will be sent to the corresponding secretary.

When a member of your chapter moves and wishes to transfer to another chapter, the corresponding secretary takes an additional important step to make sure the member is contacted by P.E.O.s in her new location. In addition to submitting her new address and email address on the **Member Update** form (see above), you will complete the **Notice of Member in Your Area**.

The Chapter Membership History (CMH) record replaced the chapter’s General Enrollment Book, which is to be retained in your corresponding secretary supplies for the life of the chapter. The **CMH** is provided by the Membership Department and must be kept in your corresponding secretary files for the life of the chapter. The CMH record lists all P.E.O.s who have been a member of your chapter, except those who died prior to 1980. Information about chapter members who died prior to 1980 may be found in the retired General Enrollment Book.

No entries are made on this CMH – it serves solely as your chapter’s historical record of membership. An updated copy will be provided by the Membership Department upon request. However, it’s recommended that requests for updated copies of the CMH not be made in increments less than five years.

Another record, the Membership Roster, provides membership details for your chapter that complement the information provided in the CMH.

The Membership Roster record is a printout of your chapter members who were living during the past P.E.O. fiscal year. It includes details of membership activity that occurred during that year, including initiations, transfers in and transfers out, deaths, reinstatements and the members’ name, address and email address. This should be printed by the chapter corresponding secretary once the chapter has been released by the s/p/d.

The Annual Report is to be submitted by March 10. A very important part of your role as corresponding secretary is completing this report. **Due to the significance of this report, a separate training video is available for you on the P.E.O. International website.**

In addition to completing the Annual Report, you’ll complete other duties as a part of the annual report process. Corresponding secretaries must provide input on three additional records (during odd-numbered years a fourth record may be required). Entries for the following reports must be submitted online by you or by your chapter technology contact:

1. **Report of Election of Officers of Local Chapters** (Even if officers continue for another year, a report must still be entered for the new P.E.O. year; if your officers change mid-year due to vacancy, you will need to update this information at that time)
2. **Local Chapter Report of Project Chairs**

**Corresponding Secretary**

Staying in Touch 3 of 4 03/24
3. **State/Provincial/District Convention – Delegates and Alternates**
4. **Nominee for Delegate to Convention of International Chapter** (select chapters in odd-numbered years only)

These reports can be found on the [P.E.O. International website](http://www.peo.org) in the **Resources** section. You need only the Member ID numbers of the respective members. After submitting the Member ID numbers, the contact information that appears on the screen for the respective members must be verified. You will be prompted on-screen during this process. Be certain to click “Submit” before leaving the screen. If you do not click “Submit,” your entries will not be saved.

Of these membership records, the following:

- Chapter Membership History (CMH)
- Membership Roster

. . . must be kept together in the corresponding secretary files.

Although the General Enrollment Book is no longer used to record membership activity, it must also be kept in the corresponding secretary’s files for the life of the chapter.

Trainings for other officers are available and can be found on the [P.E.O. International website](http://www.peo.org) in the **Resources** section.

Let’s review the key points about the duties and responsibilities of your role as corresponding secretary:

1. **Tools and tips for fulfilling your responsibilities:** Most of the instructional materials and forms you need to fulfill your duties are available on the [P.E.O. International website](http://www.peo.org). Become familiar with information regarding corresponding secretary duties provided in the [Constitution](http://www.peo.org), [IOLC](http://www.peo.org) and state/provincial/district chapter bylaws and standing rules.

2. **Membership records:** Three membership records are vital for corresponding secretaries. It’s essential that membership activity be reported timely on the [Member Update](http://www.peo.org) form. Become familiar with, and learn the differences between, the Chapter Membership History Membership Roster records. The accuracy of your chapter’s membership records depends on your efficient management of these records.

3. **Annual reports:** The Annual Report is completed every March and submitted electronically. The election of officers and delegates to conventions and the appointment of project chairs are reported online by you or your chapter’s technology contact.

The time you are committing to serve as your chapter’s corresponding secretary is greatly appreciated. Thank you for making this commitment to your chapter and for your dedication to P.E.O. If you have any questions about the procedures of your office, please contact your s/p/d chapter secretary or, if your chapter is in non-chartered territory, contact the supervisor of the Membership Department in our executive office.

Thank you!