

Corresponding Secretary
Training 2022





What is my role?

❖ Keep Track of Chapter Membership

- ❖ Member Update Form (CIM)
- ❖ Chapter Membership History (CMH)
- ❖ Chapter Membership Summary (CMS)
- ❖ Annual Report of Corresponding Secretary (ARCS)

❖ Monthly Report at Local Chapter Meetings

- ❖ Corresponding Secretary's Monthly Report to Chapter
- ❖ Record Correspondence Sent and Received
- ❖ Give Report to Recording Secretary for Minutes
- ❖ "No Report"

If you have two meetings in a month, only provide a monthly report at the first meeting. At the second meeting, only read the correspondence.



Supply List

❖ Items to Order

- ❖ Invitation to Membership
- ❖ Invitation to Transfer OR *see below*

❖ Items on Website

- ❖ Member Update(CIM) Form (online option only)
- ❖ Corresponding Secretary's Monthly Report to Chapter
- ❖ Report of Election of Officers of Local Chapter
- ❖ State/Provincial/District Convention – Delegates & Alternates
- ❖ International Convention – Nominee for Delegate
- ❖ Invitation to Transfer (peointernational.org – Resource Library > Local Chapter Officers > Corresponding Secretary)
- ❖ Membership Worksheet for Corresponding Secretaries (coloradopeo.org – Local Chapters > Local Chapter Officers Information and Forms > Corresponding Secretary)

Do you know your P.E.O. Member #? Do you know where to find it? Username = #####

Password = XX\CO (above Enter)



Keep Track of Chapter Membership

❖ Increase in Membership

- ❖ New Initiate – Submit Member Update (CIM) Online – need Member Information, record Member ID #
- ❖ Transfer In – Submit Member Update Online – need Member ID #
- ❖ Reinstatement – Submit Member Update Online – need Member ID #

❖ Decrease in Membership

- ❖ Transfer Out – No Report
- ❖ Death – Submit Member Update Online
- ❖ Inactive – Record on ARCS – date last day of year

❖ Name and Contact Information Changes

- ❖ Submit Member Update Online – need Member ID #



Annual Election Reporting

❖ Local Chapter Officers and Contacts

- ❖ President
- ❖ Corresponding Secretary
- ❖ Treasurer
- ❖ Local Chapter Technology Contact
- ❖ Membership Chair
- ❖ Delegate to State Convention
- ❖ Alternate to State Convention
- ❖ Delegate to International Convention, applicable

Submit these elections after your March Local Chapter Meeting.



Record Retention

❖ **Corresponding Secretary's Monthly Report to Chapter**

- ❖ Give all correspondence received and read to your Recording Secretary for her minutes along with your monthly report. Do not maintain in CS files.

❖ **Chapter Membership Summary (CMS)**

- ❖ Received each January along with Annual Report information. Review to list on ARCS any changes from CMS. Keep until the next year's is received.

❖ **Annual Release Letter**

- ❖ Received each March/April from Colorado State Secretary, maintain for six years. Suggestion: Keep a copy of your ARCS as well.

❖ **Chapter Membership History (CMH)**

- ❖ Received in 2010, may request a new one every five years. Maintain for life of the chapter.

❖ **General Enrollment Book**

- ❖ Chapters organized before March 1, 2010. Maintain for life of the chapter.



Annual Report Timeline

This information will change when International puts Annual Reports online.

❖ January

- ❖ Annual Report of the Corresponding Secretary (ARCS) sent to Local Chapter Presidents.
- ❖ She should distribute to you – if not, ask.

❖ February


- ❖ Read names of Inactive Members from Chapter Membership Summary (CMS) at Local Chapter Meeting.
- ❖ May report as “Lost Contact” after 25 years.

❖ March 10

- ❖ Send completed ARCS to Colorado Administrative Assistant.
- ❖ Signed by President and Corresponding Secretary.
- ❖ **ACTIVE MEMBER TOTAL MUST AGREE WITH TREASURER.**
- ❖ **Note: DO NOT include member changes that happen after the end of February.**

❖ March/April

- ❖ Annual Release Letter received, read at April Local Chapter Meeting. May hand over to new Corresponding Secretary.



Need help? Send me, or the current State Secretary, a note to:

- ❖ Run a membership summary for your chapter
- ❖ Find a member
- ❖ Help you navigate the International or State websites
- ❖ Help get member emails added to Constant Contact when members aren't receiving the monthly newsletter.

**Once again, I am Kathryn Pirie, your current State Secretary.
My phone number is 303-250-2592 and
My email is peo.kwirekat@gmail.com.**



POP QUIZ!!!

- ❖ How many digits are in your member number?
- ❖ What if the number only has 6 digits?
- ❖ Can you input a new inactive sister on a Member Update Form?
- ❖ What does ARCS stand for?
- ❖ True or False – the President should report all Convention Delegates?
- ❖ How long do you keep copies of your monthly report?
- ❖ True or False – only active sisters can reinstate?
- ❖ How long do you maintain your copy of the CMS?
- ❖ What is one document is not downloadable on the Int'l website?
- ❖ How long do you maintain your Release Letters?