



President and Vice President

Leading With Confidence >





Training Overview

- Orientation to administrative processes
- Assist in streamlining the work of the local chapter
- Enjoy your duties as president or vice president ➤

Six Key Areas

1

Order of the
Meeting

2

Presentation
of Names
for
Membership

3

Balloting on
a Candidate

4

Initiation by
Affirmation

5

Membership
Transactions
(*Transfers,
Reinstatements*)

6

Installation
of Officers ➤

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Effective Leadership

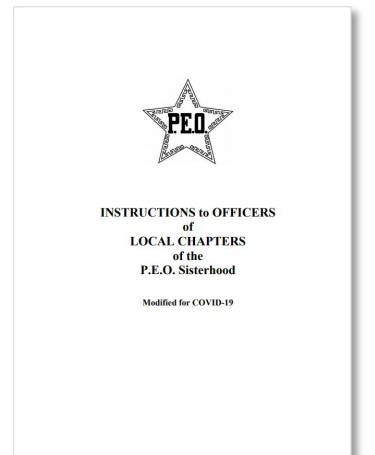
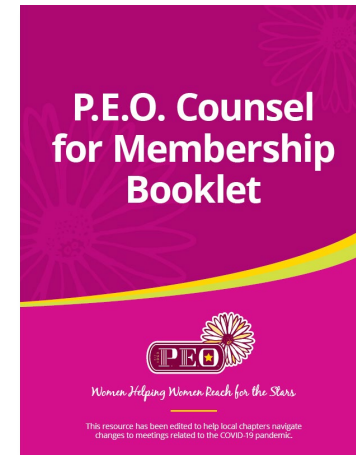
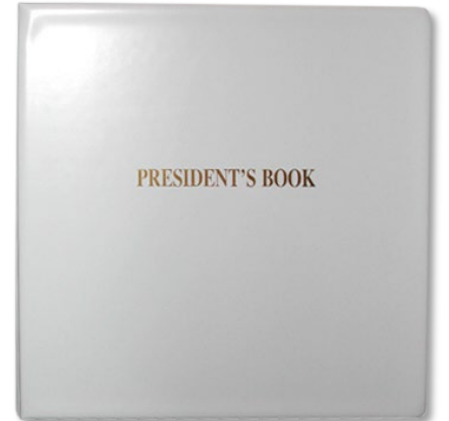
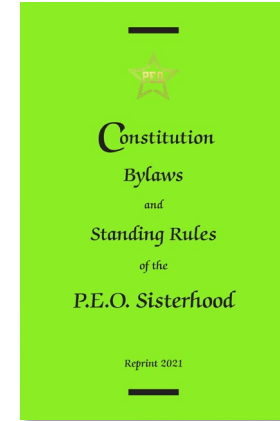
- Effective leadership can take place when the leader *feels* confident and realizes that she *really is* competent.
- There are *three* key reasons why you should have confidence in your ability to lead:
 1. You have all the tools needed to **do the job well** – you only have to become familiar with them.
 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.
 3. Your state/provincial/district officers and International Chapter officers are very willing to help you **not only succeed but enjoy the journey.** ➤



1 Order of the Meeting

- Resources

1. P.E.O. Constitution
2. President's Book (Jan 22 updated)
3. P.E.O. Counsel for Membership Booklet
4. Instructions to Officers of Local Chapters (IOLC) Modified for COVID-19
5. State/provincial/district bylaws and standing rules



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1 Order of the Meeting

- President's Book
 - Order of Business for chapter meetings
- Meeting agenda
 1. Call to Order
 2. Opening Ode – Objects and Aims
 3. Devotions
 4. Formal Opening of Meeting

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1 Order of the Meeting

- Meeting agenda
 5. Reading of Minutes
 6. Initiation by Affirmation
 7. Report of Treasurer
 8. Report of Corresponding Secretary and Reading of Correspondence
 9. Chapter Business
 - A. *Committees*
 - B. *Unfinished Business*
 - C. *New Business* ➤



2 Presentation of Names for Membership

- Sponsor for Membership form
 - Three sponsoring sisters
 - Regular or special meeting
- A name which does not receive three sponsors when it is first presented will be offered at the next meeting.
 - See **Appendix #9** of the President's Book. ➤



The image shows a 'SPONSOR FOR MEMBERSHIP' form from the PEO (Professional Engineers and Officers) organization. The form is titled 'SPONSOR FOR MEMBERSHIP' and includes a PEO logo. It contains fields for 'Date', 'To Our Sisters:', 'We, the undersigned, are well acquainted with', 'Name', 'Spouse's Initials', 'Address', 'City', 'State/Province', 'Zip/Postal Code', 'Phone Number', and 'Email Address'. There is a section for 'and recommend her as a woman of refinement and culture, who would, so far as we know, be congenial to every member of our chapter, and who would be a desirable addition, not only to Chapter _____ but to the P.E.O. Sisterhood at large.' followed by three numbered lines for signatures. Below this is a 'Signed' line and a 'Members of' section with fields for 'Chapter', 'City', and 'S/P/D'. A pink oval highlights the three numbered signature lines. At the bottom, there is a note: 'THIS FORM TO BE FILLED OUT IN ACCORDANCE WITH THE INSTRUCTIONS FOR PRESENTING AND PROPOSING NAMES, TO BE FOUND IN PRESIDENT'S BOOK.' and a date '11/15'.



3 Balloting on a Candidate

- Appendix #10 outlines the procedure.
- See also all references to balloting in Instructions to Officers of Local Chapters (IOLC) Modified for COVID-19.

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3 Balloting on a Candidate

In-Person Meeting Flow Chart

Vice president distributes and collects ballots. ➡ President and recording secretary review ballots; president announces results.

Virtual Meeting Flow Chart

Prior to the start of the meeting, videoconference host sets up ballot(s) utilizing the platform's polling feature. ➡ President must be able to receive ballots submitted by video polling, email and text during the meeting directly after asking all to vote. ➡ President reviews all ballots submitted and announces results.

Hybrid Meeting Flow Chart

Prior to the start of the meeting, videoconference host sets up ballot(s) utilizing the platform's polling feature. ➡ President must be able to receive ballots submitted by members attending in person, video polling, email and text during the meeting directly after asking all to vote. ➡ President reviews all ballots submitted and announces results.

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3 Balloting on a Candidate


- The **president** asks the recording secretary to read the name(s) of the woman or women proposed and their sponsors.
- After the name(s) is/are read, the **president** asks 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.
- The **president** reads the instructions for balloting.
- After voting is complete, ballots are collected and/or votes are tallied.

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3 Balloting on a Candidate

- President's Book agenda item #13
- Appendices #10 and #11
- Instructions to Officers of Local Chapters (IOLC)
Modified for COVID-19 ➤

4 Initiation by Affirmation

- Ceremony of Initiation will be conferred upon the initiate when meetings are no longer restricted.
- See President's Book Item of Business #6.
- Initiation by Affirmation form
 - President provides to candidate prior to meeting.
 - Candidate signs and returns to president after meeting.
 - President retains form until Ceremony of Initiation is conducted.
- Ceremony of Initiation will resume July 1. 
- POI @ convention



5 Membership Transactions

- President and vice president must have a clear working knowledge of the process for membership transactions.
- Corresponding secretary is ultimately responsible for recording and submitting all membership transactions.
- President encourages promptness in reporting changes.

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5 Membership Transactions

- Transfers

- February – not able to extend or accept
- Chapter votes to invite member into chapter and corresponding secretary sends invitation to transfer.
- Invited member sends acceptance letter.
- Reading acceptance letter at chapter meeting completes transfer.
- Corresponding secretary submits **Member Update** form to P.E.O. Membership Department (ONLINE).
- P.E.O. Membership Department notifies member's former chapter of transfer.
- Corresponding secretary of former chapter makes note of transfer out.

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5 Membership Transactions

- **Reinstatements** (Does **not require** a vote of the chapter.)
 - Inactive member notifies by email or post that she wishes to reinstate.
 - Sends fee of \$35 to chapter.
 - No chapter vote required – payment of fee and receipt of reinstatement letter complete reinstatement.
 - If an inactive member is reinstating *and transferring*, her reinstatement is effective as of the date of the chapter meeting *her letter accepting the invitation to transfer is read*.
 - Corresponding secretary records active status and submits **Member Update** form to P.E.O. Membership Department (ONLINE).
 - Local chapter treasurer issues membership card to member. ➤



6 Installation of Officers

- Officers are elected annually at or before first regular meeting in March.
- Installation must occur at first March meeting.
- If an officer cannot be installed by May 1, the president appoints a new officer, which the chapter ratifies. ➤



Important Additional Resources

- Trainings for other officers are available and can be found on the P.E.O. International member website: **Resource Library/Local Chapter Officers/Local Officer Training. >**



Summary

We have reviewed the work of the local chapter for the president and vice president in these six major categories:

1. **Order of Business:** The order groups actions together to allow efficient use of time.
2. **Sponsoring a Candidate:** Sponsoring a candidate requires three signatures.
3. **Balloting on a Candidate:** Review the balloting process specific to the format of meeting (in-person, virtual or hybrid).

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Summary

We have reviewed the work of the local chapter for the president and vice president in these six major categories:

4. **Initiation by Affirmation:** Use Item of Business #6 in the President's Book.
5. **Membership Transactions:** A clear working knowledge of the way transfers and reinstatements are handled will help with these important procedures.
6. **Installation of Officers:** Officers are elected annually at or before the first regular meeting in March. Installation must take place at the first regular meeting in March. ➤





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