

## RECORDING SECRETARY TRANSITION TRAINING

The outgoing recording secretary should review each of these items to fully train the incoming officer. Check off each item when covered, sign the bottom of form and return to chapter president by next regular chapter meeting.

**IW = International Website WW = Wisconsin Website**

**When searching the library, start with one-word searches. It's oftentimes easier to find that way.**

**Make sure to "Clear" all searches before beginning.**

- Handout Recording Secretary's Timeline **WW** and IOLC (Instructions to Officers of Local Chapters) **IW**.
- Review *Instructions to Recording Secretary - Instructions for Minutes* found on the international website **IW** under P.E.O. HUB>Resources>Library>Search> Instructions to Recording Secretary - Instructions for Minutes. Search "*Recording Secretary*"
- View online training found on the international website **IW** under P.E.O. Hub>Library>Search>*Recording Secretary Training: Words That Count*. Search "*Words*"
- Review how to find items on **WW** (WI bylaws, forms, etc.) Remember the shortcuts that can be found under "My Chapter>Resources" in the upper right quadrant of the HUB page.
- Review where you keep your recent chapter minutes according to the vote of your chapter. Life of chapter Minutes of chapter must be kept in their original form for a minimum of 10 years Upon vote of chapter, minutes older than 10 years may be preserved in any manner in accordance with archival policy but must always kept by the recording secretary.
- Review the current template for local chapter minutes (regular and special meetings) found on the international website **IW** under P.E.O. HUB>My Chapter (upper right quadrant)>Chapter Info>Resources>*Template for Minutes of Local Chapter Meeting*.
- Review use of marginal notes such as:
  - \_\_ Proposing a Name                      \_\_ Balloting on a Name
  - \_\_ Invitation to Transfer                  \_\_ Letter of Acceptance to Transfer in
  - \_\_ Action on Chapter Budget              \_\_ Action on a Request for Reinstatement
  - \_\_ Approved Annual Reports              \_\_ Report of the Auditing Committee
  - \_\_ Report of Convention of International Chapter
- Review supply ordering and current supply needs (Pencils and ballots for voting, envelopes, etc.) Also, review *Local Chapter Supply Order Form*. **IW** > P.E.O. HUB> My Chapter (upper right quadrant)>Chapter Info>Resources> *Local Chapter Supply Order Form*.
- Review the *P.E.O. Style Guide* found on the International website **IW**. To find, go to **IW**> HUB>Resources>Library>in the Search Documents>type *P.E.O. Style Guide*. Search "*Style*"
- Read each *News & Views* for officer information and updates **WW**.
- Outgoing recording secretary to confirm to incoming recording secretary, if there are revisions, that a copy of your bylaws has been sent to your chapters designated state board contact (Board Buddy).

***Materials and training have been covered for our chapter recording secretary.***

Outgoing Recording Secretary \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Incoming Recording Secretary \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_