



LOCAL AERIE OFFICERS TRAINING



LOCAL AERIE OFFICERS TRAINING

- **JUNIOR PAST WORTHY PRESIDENT**
- **WORTHY PRESIDENT**
- **SECRETARY**
- **TREASURER**
- **TRUSTEES**
- **CHAPLAIN**
- **CONDUCTOR**
- **GUARDS**
- **AUDITOR**



LOCAL AERIE OFFICERS TRAINING

JUNIOR PAST WORTHY PRESIDENT

- . RETIRING WORTHY PRESIDENT
- . IS ON TRIAL COMMITTEE IF APPOINTED
- . IF BY-LAWS PERMIT MAY SERVE AS MEMBER OF THE BOARD OF TRUSTEES
- . HAS A PART IN THE RITUAL
- . IF A VACANCY OCCURS IN THE OFFICE OF THE J.P.W.P., THE WORTHY PRESIDENT WILL APPOINT FROM THE P.WP.'S, A P.W.P. TO FILL THE CHAIR



LOCAL AERIE OFFICERS TRAINING

WORTHY PRESIDENT

- . PRESIDES OVER ALL AERIE MEETINGS
- . MUST ENFORCE ALL LAWS OF THE ORDER
- . MUST MAINTAIN HARMONY IN THE AERIE
- . HAS GENERAL SUPERVISION OVER ALL AFFAIRS OF THE AERIE EXCEPT WHERE VESTED ELSEWHERE
- . IN THE EVENT OF AN ABSENT OFFICER HE APPOINTS AN OFFICER PRO –TEM TO FILL THE ABSENT OFFICERS CHAIR



LOCAL AERIE OFFICERS TRAINING

WORTHY PRESIDENT

- . APPOINTS ALL COMMITTEES THAT ARE REQUIRED BY THE LAWS OF THE ORDER
 1. BY-LAWS COMMITTEE
 2. SICK & VISITING
 3. MEMBERSHIP
 4. MEMBERSHIP SECURITY
 5. FINANCE



LOCAL AERIE OFFICERS TRAINING

WORTHY PRESIDENT

6. TRIAL COMMITTEE - TO BE COMPRISED OF FIVE PWP'S AND TWO ALTERNATES. IF THERE ARE NOT ENOUGH PWP'S AVAILABLE TO MAKE UP THIS COMMITTEE, THE WORTHY PRESIDENT MAY APPOINT MEMBERS IN GOOD STANDING
7. MEETINGS ATTENDANCE
8. PUBLICITY
9. INTERVIEWING



LOCAL AERIE OFFICERS TRAINING

WORTHY PRESIDENT

- . IN ACCORDANCE WITH THE RITUAL, HE QUESTIONS THE FINANCES OF THE AERIE AT ALL MEETINGS
- . ENSURES THAT ALL OFFICERS AND EMPLOYEES ARE BONDED PRIOR TO TAKING OFFICE OR ASSUMING THEIR DUTIES
- . ENSURES THAT AERIE FINANCIAL RECORDS ARE AUDITED WHEN REQUIRED
 1. MONTHLY AUDITS
 2. ANNUAL REPORTS



LOCAL AERIE OFFICERS TRAINING

WORTHY PRESIDENT

- . ENSURES THAT ALL AERIE FUNDS ARE DEPOSITED TO THE PROPER ACCOUNTS
 - 1.GENERAL FUND
 - 2.BENEFIT FUND
 - 3.SOCIAL FUND (OPTIONAL)
 - 4.BUILDING FUND (OPTIONAL)
- . SIGNS ALL CHECKS DRAWN BY THE SECRETARY*



LOCAL AERIE OFFICERS TRAINING

WORTHY PRESIDENT

- . SIGNS ALL OTHER PAPERS AND REPORTS THAT MAY BE REQUIRED
- . IF NO PARLIAMENTARIAN IS APPOINTED, HE DECIDES ALL PARLIAMENTARY QUESTIONS*
- . HE INSPECTS ALL BALLOTS ON MEMBERSHIP
- . HE WILL CAST THE DECIDING VOTE ON ALL OCCASIONS WHERE THERE IS A TIE+
- . PRIOR TO BEING INSTALLED AS WORTHY PRESIDENT, HE CHECKS WITH THE CURRENT



LOCAL AERIE OFFICERS TRAINING

WORTHY PRESIDENT

PRESIDENT, SECRETARY, TREASURER AND AUDITOR TO MAKE SURE THAT ALL REQUIRED REPORTS ARE READY TO BE MAILED OR HAVE BEEN MAILED

1. SEMI-ANNUAL MEMBERSHIP REPORT
(SECRETARY)
2. TREASURERS REPORT
3. AERIE AUDITORS REPORT



LOCAL AERIE OFFICERS TRAINING

WORTHY PRESIDENT

- . ENSURES THAT GENERAL MEMBERSHIP MEETINGS ARE HELD TWICE MONTHLY IN ACCORDANCE WITH THE STATUTES*
- . IF THE AERIE HAS AN AUXILIARY, THE AERIE AND AUXILIARY ARE TO HOLD A JOINT MEETING AT LEAST QUARTERLY - SECTION 72.1(b)
- . HE MAY CALL A SPECIAL MEETING OF THE MEMBERSHIP IF NECESSARY+



LOCAL AERIE OFFICERS TRAINING

WORTHY PRESIDENT

- HE ENSURES THAT AN OFFICERS MEETING IS HELD AT LEAST TWICE MONTHLY*
- THE PRESIDENT IS RESPONSIBLE FOR ENSURING THAT THE RITUAL IS FOLLOWED IN ALL ASPECTS OF AERIE BUSINESS +
- THERE IS NO SHORT FORM FOR MEETINGS
OFFICERS MAY READ THEIR RESPECTIVE
PARTS OF THE RITUAL



LOCAL AERIE OFFICERS TRAINING

WORTHY VICE PRESIDENT

- THE Worthy Vice-President shall assist the Worthy President in preserving order and decorum in the Aerie, he shall in conjunction with the Worthy President inspect all ballots on applicants, and report the same to the Aerie; he shall preside in the absence of the Worthy President; and he shall perform all other duties required of by the Laws of the Order. He will assist in the initiation of the



LOCAL AERIE OFFICERS TRAINING

- Candidates. If the Worthy President is absent from the jurisdiction of the Aerie, or if for any other reason he is incapable of performing his duties of his office, the Worthy Vice-President shall exercise all the powers and perform all duties of the Worthy President which may be required during such absence or incapacity. The position of Worthy Vice-President may not be appointed.



LOCAL AERIE OFFICERS TRAINING

WORTHY CHAPLAIN

- . HE SHALL HAVE CHARGE OF THE DEVOTIONAL EXERCISES OF THE AERIE IN ACCORDANCE WITH THE RITUAL
- . IF ASKED , HE SHALL ATTEND AND PARTICIPATE IN THE FUNERAL OF A BROTHER
- . HE WILL ASSIST THE WORTHY CONDUCTOR IN CHECKING MEMBERS RECEIPTS IN ACCORDANCE WITH THE RITUAL
- . HE WILL ASSIST IN THE INITIATION OF CANDIDATES



LOCAL AERIE OFFICERS TRAINING

WORTHY CONDUCTOR

- . SETS UP THE MEETING ROOM PER THE RITUAL
- . HAS CUSTODY OF ALL RITUAL PARAPHERNALIA
- . PER THE RITUAL, CHECKS THE MEMBERSHIP CARDS OF ALL PERSONS IN THE MEETING ROOM TO ENSURE THAT THEIR DUES ARE CURRENT
- . PREPARES THE BALLOT BOX FOR THE ELECTION OF MEMBERS



LOCAL AERIE OFFICERS TRAINING

WORTHY CONDUCTOR

- . SUPERVISES THE VOTING ON CANDIDATES
- . INTRODUCES ALL VISITORS AND CONDUCTS THEM TO THEIR SEATS
- . ASSISTS IN THE INITIATION OF CANDIDATES
- . PERFORMS OTHER DUTIES AS REQUIRED OF HIM BY THE WORTHY PRESIDENT AND BY THE LAWS OF THE ORDER



LOCAL AERIE OFFICERS TRAINING

INSIDE AND OUTSIDE GUARD

- . STATIONED AT THE INNER DOOR OF THE MEETING ROOM
- . CHECKS THE OFFICIAL RECEIPT OF ALL MEMBERS DESIRING ADMISSION TO THE MEETING ROOM WHILE THE AERIE IS IN SESSION
- . INSIDE GUARD ASSISTS IN THE INITIATION OF CANDIDATES

THE AERIE SECRETARY

The Secretary's office is one of the most important offices of the Local Aerie of the Fraternal Order of Eagles. The Secretary comes in contact with the entire membership more than any other office in the Aerie, as he is collecting dues from the members throughout the year and corresponding with them relative to various activities and programs. The manner in which he conduct his office and the tact and diplomacy that he uses in his dealings with the membership has much to do with the progress of the Aerie and also the standing of the Aerie in the community.

All the records of the Aerie are maintained in the Secretary's office. Many of the records are not only important now but in years to come and should be maintained with the idea in mind that they will be available at any time in the future when needed. (See Page 29 of the Officer's Handbook)

SECRETARY

- **SECTION 85.1** It shall be the duty of the Secretary to keep a full and complete record of the proceedings of the Aerie in a book provided for that purpose by the Grand Aerie or if the records are kept electronically, they shall be printed and read at each meeting and , once approved by the membership and signed by the Worthy President and Secretary, copies shall be kept and protected in a three (3) ring binder or book for that purpose; to read to the Aerie all reports, bills and communications which may be presented; to assist in the transaction of the business of the Aerie, to write all communications, to fill out all certificates and cards granted by the Aerie, to keep and maintain at all times a full, complete and up-to-date roster of the membership, committees as required by MMS and officers of the Aerie, with the latest and up-to-date residence, email address and mailing address of each member and officer, and to keep the Grand Aerie, and such other departments of the Grand Aerie as the Grand Secretary shall direct, at all times promptly advised of all changes in membership and officers; to issue all summonses and notices which may require his signature to attest them; to affix the Seal of the Aerie to all documents which may require it; to notify the Grand Secretary forthwith of the expulsion of any member and the cause thereof; to notify the Grand Secretary forthwith of any officer removed from office by the Trial Committee and to perform such other duties as may be required of them by the Laws and usages of the Order.



LOCAL AERIE OFFICERS TRAINING

AERIE SECRETARY

- . HE WILL WRITE ALL COMMUNICATIONS
- . HE FILLS OUT ALL CERTIFICATES AND CARDS GRANTED BY THE AERIE
- . HE MUST MAINTAIN A COMPLETE UP TO DATE ROSTER OF THE MEMBERSHIP AND OFFICERS OF THE AERIE
- . HE WILL MAINTAIN A SYSTEM OF BOOKS AND ACCOUNTS AND MAKE REQUIRED REPORTS TO THE GRAND AERIE



LOCAL AERIE OFFICERS TRAINING

AERIE SECRETARY

- . HE ISSUES RECEIPTS FOR DUES
- . HE NOTIFIES BY MAIL ALL MEMBERS THAT ARE DELINQUENT IN THEIR DUES*
- . HE WILL PREPARE CHECKS AGAINST ALL FUNDS OF THE AERIE FOR ALL APPROVED BILLS
- . HE RECEIVES ALL MONEYS DUE THE AERIE AND CREDITS THEM TO THE PROPER ACCOUNT@



LOCAL AERIE OFFICERS TRAINING

AERIE SECRETARY

- . IN THE ABSENCE OF THE TREASURER HE WILL DEPOSIT ALL AERIE FUNDS IN THE PROPER ACCOUNT
- . HE SHALL RECEIVE AND RECEIPT FOR ALL MONEY AND/OR PROPERTY RECEIVED OR COMING IN TO THE POSSESSION OF OR UNDER THE CONTROL OF ANY:
 1. COMMITTEE
 2. DEGREE TEAM
 3. OTHER



LOCAL AERIE OFFICERS TRAINING

AERIE SECRETARY

- . HE WILL ISSUE RECEIPTS FOR MONEY RECEIVED FROM ALL SOURCES
- . HE MAY APPOINT AN ASSISTANT*
- . AT EVERY AERIE MEETING, HE SHALL READ OFF THE FOLLOWING
 1. AN ITEMIZED ACCOUNT OF RECEIPTS AND DISBURSEMENTS FROM EACH FUND SINCE THE LAST MEETING
 2. AT THE LAST REGULAR MEETING OF EACH MONTH HE SHALL READ AN ITEMIZED LIST OF



LOCAL AERIE OFFICERS TRAINING

AERIE SECRETARY

ALL APPROVED UNPAID BILLS OF THE AERIE ON
HAND AND THE DATE SUCH BILLS WERE DUE
AND PAYABLE

- UPON REQUEST, HE SHALL DELIVER ALL
BOOKS, RECORDS AND PAPERS, TO THE AERIE
AUDITOR



LOCAL AERIE OFFICERS TRAINING

AERIE SECRETARY

- THE SECRETARY SHALL RECEIVE COMPENSATION AS SPECIFIED IN THE AERIE BY-LAWS
 1. HE SHALL BE COMPENSATED BASED ON THE NUMBER OF MEMBERS THAT ARE IN GOOD STANDING AND WHOSE DUES ARE NO MORE THAN THREE (3) MONTHS IN ARREARS
 2. HE SHALL NOT BE PAID UNTIL ALL REQUIRED REPORTS HAVE BEEN COMPLETED AND TRANSMITTED



LOCAL AERIE OFFICERS TRAINING

AERIE SECRETARY

- . ALL AERIES ARE REQUIRED TO BE ON THE MEMBERSHIP MAINTENANCE SYSTEM
- . THE (MMS) ALLOWS THE SECRETARY TO:
 1. TRACK THE AERIE MEMBERSHIP
 2. PREPARE MEMBERSHIP CARDS
 3. PRINT MAILING LABELS
 4. PRINT DELINQUENT MEMBERS LISTS
 5. PRINT DUES REMINDERS
 6. PREPARE REPORTS, ROSTERS, STATEMENTS, ETC.



LOCAL AERIE OFFICERS TRAINING

TREASURER

- . THE TREASURER IS TO DEMAND AND RECEIVE FROM THE SECRETARY ALL MONEY BELONGING TO THE AERIE
- . HE IS TO GIVE THE SECRETARY A RECEIPT AND DEPOSIT THE MONEY WITHIN 48 HOURS
- . KEEP RECORDS, BOOKS AND ACCOUNTS AND MAKE REQUIRED REPORTS TO THE GRAND AERIE



LOCAL AERIE OFFICERS TRAINING

TREASURER

- . IF AUTHORIZED BY THE AERIE, HE SHALL SIGN ALL CHECKS DRAWN FROM THE PROPER ACCOUNT, SIGNED BY THE WORTHY PRESIDENT AND ATTESTED TO BY THE AERIE SECRETARY
- . ALL CHECKS ARE WRITTEN BY THE SECRETARY



LOCAL AERIE OFFICERS TRAINING

TRUSTEES

- . UNDER THE DIRECTION OF THE AERIE, THE BOARD OF TRUSTEES SHALL HOLD IN TRUST:
 1. ALL REAL PROPERTY BELONGING TO THE AERIE *
 2. ALL PERSONAL PROPERTY NOT ENTRUSTED TO ANY OTHER OFFICER BY THE LAWS OF THE ORDER+



LOCAL AERIE OFFICERS TRAINING

TRUSTEES

- . THEY SHALL HOLD WEEKLY MEETINGS*
- . AFTER THEIR INSTALLATION, THEY SHALL IMMEDIATELY ELECT ONE OF THE MEMBERS AS CHAIRMAN OF THE BOARD OF TRUSTEES+
- . THE CHAIRMAN OF THE BOARD WILL ACT AS THE SPOKESMAN FOR THE BOARD WHEN SETTING THE MEETING AGENDA OR WHEN CARRYING OUT THE ACTIONS OF THE BOARD



LOCAL AERIE OFFICERS TRAINING

TRUSTEES

- . MINUTES SHALL BE KEPT OF ALL BOARD MEETINGS*
- . IF THE BY-LAWS PROVIDE, THE AERIE SECRETARY MAY SERVE AS SECRETARY TO THE BOARD. OTHERWISE, THE SECRETARY TO THE BOARD MUST BE A MEMBER OF THE B.O.T.
- . THEY SHALL EMPLOY, DISCHARGE AND CONTROL THE CONDUCT AND DUTIES OF ALL AERIE EMPLOYEES



LOCAL AERIE OFFICERS TRAINING

TRUSTEES

- . IF AUTHORIZED BY THE BY-LAWS THE TRUSTEES ARE EMPOWERED TO EMPLOY (AND DISCHARGE) SUCH EMPLOYEES THAT ARE NEEDED TO OPERATE THE BUFFET AND SOCIAL ROOMS OF THE AERIE WITHOUT FIRST OBTAINING PERMISSION FROM THE AERIE
- . THE SALARIES OF ALL EMPLOYEES ARE DICTATED IN THE BY-LAWS*



LOCAL AERIE OFFICERS TRAINING

TRUSTEES

- . THE BOARD WILL APPROVE ALL BILLS CONTRACTED FOR OR ON ACCOUNT OF THE CONDUCT OF THE AERIE HOME, BUFFET, OR THE CLUBROOM. THEY WILL THEN SUBMIT THESE BILLS TO THE AERIE FOR ITS FINAL ACTION.
- . THE BOARD IS TO OPERATE THE AERIE BUFFET AND THE SOCIAL QUARTERS IN A FISCALLY SOUND MANNER



LOCAL AERIE OFFICERS TRAINING

TRUSTEES

- . IF AUTHORIZED BY THE BY-LAWS, THE BOARD MAY DELEGATE THE OPERATION OF THE KITCHEN TO THE LADIES AUXILIARY
- . THE BOARD HAS NO AUTHORITY TO CHARGE THE LADIES AUXILIARY RENT TO USE THE AERIE HOME FOR ITS MEETINGS
- . THE BOARD SHALL ENFORCE ALL LOCAL AERIE HOUSE RULES GOVERNING THE PREMISES AND THE CONDUCT OF THE AERIE & AUXILIARY MEMBERS AND GUESTS



LOCAL AERIE OFFICERS TRAINING

TRUSTEES

- . WHEN A MEMBER VIOLATES THE AERIE HOUSE RULES, THE B.O.T. WILL DISPENSE DISCIPLINARY ACTION*
- . IF THE BY-LAWS PROVIDE, THE B.O.T. MAY HIRE A MANAGER. THE MANAGER SO EMPLOYED MAY OR MAY NOT BE A MEMBER OF THE ORDER
- . IT IS THE RESPONSIBILITY OF THE B.O.T. TO ENSURE THAT THE AERIE MAINTAINS IN FULL FORCE AT ALL TIMES, ADEQUATE INSURANCE+



LOCAL AERIE OFFICERS TRAINING

TRUSTEES

- . THE GRAND AERIE MUST BE ADDED AS “ALSO INSURED” ON ALL LOCAL AERIE LIABILITY POLICIES
- . AT THE WEEKLY B.O.T. MEETING, THE B.O.T. SHALL PAY ALL MONEYS RECEIVED BY IT TO THE AERIE SECRETARY AND TAKE HIS RECEIPT FOR IT
- . AT LEAST ONCE A MONTH, THE B.O.T. SHALL REPORT TO THE AERIE SHOWING THE TRANSACTIONS OF THE BOARD



LOCAL AERIE OFFICERS TRAINING

TRUSTEES

- . THE AERIE BY-LAWS GOVERN THE EMPLOYMENT OF OFFICERS OR MEMBERS OF THE AERIE, EXCEPT THAT NO AERIE TRUSTEE, AUDITOR, OR SPOUSE OR PERSON LIVING IN A MARRIAGE LIKE RELATIONSHIP WITH A TRUSTEE OR AUDITOR , MAY BE EMPLOYED BY THE AERIE
- . THE AERIE HOUSE RULES AND BY-LAWS ARE THE EXCLUSIVE GOVERNING AUTHORITY FOR THE OPERATION OF THE SOCIAL ROOMS AND THE CONDUCT OF MEMBERS AND GUESTS IN THE SOCIAL ROOMS AND ARE TO BE ENFORCED BY THE B.O.T.



LOCAL AERIE OFFICERS TRAINING

TRUSTEES

- . WHEN MONEY IS COUNTED, IT SHOULD NEVER BE COUNTED BY JUST ONE PERSON
- . THE B.O.T. IS TO MAKE WEEKLY REPORTS EITHER ON A FORM PROVIDED BY THE GRAND AERIE OR ON A COMPUTER GENERATED FORM APPROVED BY THE GRAND AERIE*
- . THE B.O.T. SHOULD PREPARE A PHYSICAL INVENTORY OF ALL FURNITURE , FIXTURES AND CONTENTS OF THE AERIE AND UPDATED AT LEAST ONCE ANNUALLY



LOCAL AERIE OFFICERS TRAINING

TRUSTEES

- . A COPY OF THIS INVENTORY SHOULD BE TURNED OVER TO THE TREASURER AND KEPT IN THE SAFE DEPOSIT BOX FOR SAFE KEEPING
- . THE AERIE INSURANCE AGENT CAN BE ASKED TO ASSIST IN TAKING THIS INVENTORY
- . UPON DEMAND OF THE AERIE AUDITOR, THE B.O.T. SHALL DELIVER ALL BOOKS, PAPERS OR OTHER PROPERTY BELONGING TO THE AERIE, WHICH HE NEEDS FOR EXAMINATION AND AUDIT



LOCAL AERIE OFFICERS TRAINING

TRUSTEES

- . IN THE EVENT THE AERIE AUTHORIZES AN EXPENDITURE FROM ANY FUND OTHER THAN THE BENEFIT FUND, AND A MAJORITY OF THE B.O.T. FEELS THAT THE EXPENDITURE IS NOT IN THE BEST FINANCIAL INTERESTS OF THE AERIE, THE DECISION MAY BE APPEALED, BY THE B.O.T, TO THE FINANCIAL ADVISOR OF THE GRAND AERIE *
- . THE B.O.T. MUST NOT ATTEMPT TO PERFORM THE DUTIES OF THE OTHER OFFICERS BUT INSTEAD SHOULD ASSIST THEM IN PERFORMING THEIR DUTIES



LOCAL AERIE OFFICERS TRAINING

AERIE AUDITOR

- . IS APPOINTED BY THE WORTHY PRESIDENT AS SOON AS HE TAKES OFFICE
- . IT IS PREFERRED THAT THE AUDITOR BE A MEMBER OF THE ORDER BUT IT IS NOT MANDATORY
- . THE AUDITOR SHOULD IMMEDIATELY BE GIVEN A COPY OF THE CONSTITUTION AND STATUTES OF OUR ORDER AND A COPY OF THE AERIE BY-LAWS



LOCAL AERIE OFFICERS TRAINING

AERIE AUDITOR

- . IS TO EXAMINE AND AUDIT THE BOOKS OF THE FINANCIAL OFFICERS AND COMMITTEES THAT HANDLE MONEY AFTER THE CLOSE OF BUSINESS AT THE LAST MEETING OF EACH MONTH
- . SHALL MAKE A WRITTEN REPORT OF THE EXAMINATION AND AUDIT TO THE AERIE AT THE FIRST MEETING FOLLOWING THE LAST MEETING OF THE PREVIOUS MONTH



LOCAL AERIE OFFICERS TRAINING

AERIE AUDITOR

- REPORTS IN WRITING TO THE WORTHY PRESIDENT AND THE GRAND AERIE, ANY DISCREPANCY IN THE BOOKS AND RECORDS THAT HE HAS AUDITED
- MAKES A THOROUGH AND COMPLETE AUDIT OF THE FINANCIAL RECORDS OF THE AERIE SECRETARY, TREASURER, TRUSTEES AND ANY OTHER COMMITTEE THAT HANDLES MONEY



LOCAL AERIE OFFICERS TRAINING

AERIE AUDITOR

- . SUBMITS A COPY OF THE RESULTS OF THIS REPORT TO THE AERIE AND THE GRAND AERIE
- . THE AUDITOR WILL ALSO INCLUDE A COPY OF THE MOST RECENT FORM 990, ALONG WITH THE AUDIT REPORT, TO THE GRAND AERIE
- . THE AUDITOR IS THE ONLY PERSON ALLOWED TO REMOVE BOOKS AND RECORDS FROM THE AERIE
- . THE AUDITOR SHALL BE COMPENSATED FOR HIS/HER DUTIES AS MAY BE PRESCRIBED IN THE AERIE BY-LAWS*