

A PEO History of the Home Fund in Minnesota

Minnesota P.E.O.s have a long legacy of providing a “loving concern” for others. The earliest hint of what became the Minnesota PEO Home Fund comes from the State Convention of 1928. It was at this convention that the need for a welfare fund to help those close to us was addressed. From this convention came the Welfare Trust Fund with the first gift to the fund of \$100.00.

At the 1936 State convention the actual Home Fund was established, “to consist of special gifts and bequests to be kept intact and allowed to accumulate until such time as the MN State Chapter shall need to use it to establish and support a P.E.O. Home“. This fund was started with a gift of \$437.00 given by members of the convention and \$500.00 from the State Chapter funds. Another action at this convention was a vote that 15% of state dues would be allocated to the Fund annually. In 1959 a \$1.00 assessment of membership dues was allocated to the Home Fund. Over the years the fund grew often as a result of memorials and from estates. One such gift was given in 1957 in memory of Laura Garvey Smith in the amount of \$10,000 and was designated toward” furnishings and up keep in a suite in it’s P.E.O. Home”.

By the early 1970’s there was over \$60,000 in the Home Fund as a result of bequests, gifts and member assessments. Concerns grew the this money should be put to good use. In 1970 a survey was conducted of the 7 states which were currently operating homes. Supreme Chapter (International Chapter) cautioned that that it was not feasible to consider establishing a home without a base membership of at least 10,000 members. At this point Minnesota had at less than half of that number of members, It was obvious that the dream of a P.E.O. Home was no longer feasible.

At the 1972 convention the \$1.00 assessment was discontinued and the issue of what to do with the accumulated funds became a concern. Many suggestions and questions came to light. Most of the suggestions were to either give the money back to State Chapter or to divide the money among the existing projects. It was suggested to that a committee be formed to study the future of the Home Fund.

A joint Study Committee was formed to work with the Home Fund Trustees and State Chapter Executive Board. Five committee members were chosen by the State President and approved by the Executive Board which represented the reciprocity groups. In October of 1972 the presidents letter included questions to all members asking for suggestions. In November of that year the following determinations were made.

1. Establishment of a home was not feasible.
2. At the advice of legal counsel monies would not be returned to chapters.
3. A grant program called North Star Grants should be established. This Program would assist the aged indigent and infirm.
4. A provision would be made to give grants to P.E.O. International Projects.
5. The grant program would be established through a tax exempt corporation.
6. A percentage of state dues would continue to provide financial link to the corporation.

7. At the advice of legal counsel the name of the corporation would remain the Minnesota P.E.O. Home Fund.
8. The original purpose of the Home Fund would be maintained even though the likelihood of having a home is remote. This was at the advice of legal counsel.

In 1973 the resolution came before the State convention and passed with no negative votes. Between the 1973 and 1974 conventions the details of the transition were worked out. One change was to close the Welfare Emergency Fund established in 1928. The new corporation would provide for the needs of that fund. The one person receiving help from that fund became the first North Star Grant recipient.

Application forms, Financial disclosure forms and Administrative records were also developed. To complete the transfer of the funds, the Home Fund went to probate Court to request a transfer of funds of the Laura Smith estate. The judge approved the transfer provided that the money was kept intact and only interest would be used and recognition be made whenever a grant from this fund be given. In May of 1977 word was received that Mary B Patton had died and 1/5 of her estate was to go to the establishment of a PEO Home in MN. Apparently she had not heard of our struggles to establish a home. After considerable legal action the Patton money was released to be used in the North Star Program.

The current of philosophy of the home fund is as follows:
It is the belief of the Board of Trustees of the Minnesota P.E.O. Home Fund that continued good stewardship of the Funds entrusted to them will make possible gifts to sisters and others who are aged, infirm and indigent. The loving concern and financial support from the Sisterhood can make a difficult time more bearable.

Often in times of need, a person turns to one's family for support and loving concern. Through the P.E.O. Home Fund, persons in need can access financial support in a manner that maintains confidentiality and provides sisterly support. P.E.O. sisters know that their generous gifts to the Home Fund, thoughtful referrals to the Fund and careful consideration of the Board makes the sharing possible. The grant becomes not only a source of financial relief but also a reflection of concern among sisters and those in need.

Sisters care for sisters and for those who are aged, infirm and indigent. Through the Home Fund, sisters can help with dollars, concern and support. While meeting the criteria described by the Home Fund bylaws, assistance is provided in loving and creative ways to meet the unusual or special needs of sisters, families and others in need.

Currently the Home Fund has 1.5 million dollars invested with Wells Fargo which along with chapter gifts and state dues allocations of 5% of the state dues allows for approximately \$15,000 a month in grants. In 2008-2009, we made 55 grants.

Some of the typical requests we have are for rent supplements for disabled people to allow them to stay in their own homes. We have paid for Lifeline services, fuel assistance in the winter months and help to make homes handicap- accessible. We also help with pharmacy bills and grocery bills

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