



Annual Report Tips

Preparation for the annual report begins this year with the local chapter corresponding secretary verifying her chapter roster between January 1 and February 24, 2025. The electronic annual report is then completed by the local chapter president and treasurer March 1-10. To prepare for this process, local chapter officers can refer to these tips:

CORRESPONDING SECRETARY

- **NEW for 2025! Early review and update of the Membership Roster**

Between January 1 and February 24, local chapter corresponding secretaries will receive an email with instructions to review and update their Membership Roster on the P.E.O. International website by going to Manage Membership, then clicking on Access Member Update form.

- Correct any discrepancies and complete any missing information on the Membership Roster.
- On or before the review deadline (February 24), report to chapter president that the review is complete, any necessary updates have been made and the records are correct.

NOTE: This review is in **advance** of the electronic submittal of the annual report in March. With the corresponding secretary's review, her annual report duties are complete and she does not need to submit an electronic report.

- **Update contact information as changes occur**

Throughout the year, corresponding secretaries should submit a Member Update form for changes as they occur. All members also have access to the Member Update form and are encouraged to update their own information. Provide the link to the Member Update form in your chapter's communications and offer regular reminders to keep contact information current throughout the year. While members have the ability to update their own information, any chapter officer has access to do this on a member's behalf via the form.

- **Report chapter officers each year**

In order for the president and treasurer to have online access to the annual report, the corresponding secretary must annually submit a Report of Election of Officers of Local Chapters form, even if the officers are the same as the previous year. The report should be submitted after officers are installed each year in March. If a chapter did not report their 2024-25 officers, the corresponding secretary may submit the report online until



December 31. As of January 1, 2025, changes for 2024-2025 may only be reported by emailing the membership department.

TREASURER

- **Collect membership dues**

Dues must be paid to the chapter treasurer by March 1. To avoid last-minute challenges, notify members early and let them know how and where to submit payment.

PRESIDENT AND TREASURER

- **Review training resources**

Annual report training resources, videos and guides will be available on the P.E.O. International website by February 1. The chapter president and treasurer will also receive emails with additional information.

- **Create a communication plan**

Make a plan for the president and treasurer to stay in touch during the annual report process to address any questions or concerns.

- **Complete the annual report**

Notification by email will be sent to the president and treasurer on March 1 to begin the annual report. The president and treasurer will complete the electronic annual report March 1-10. The treasurer begins the process by completing the chapter Membership Roster, Dues Form and IRS-LC (for US chapters only) and the president follows with review and approval.