



GENERAL BOARD ADOPTED POLICY AND PROCEDURE

For Global Implementation and Accountability

Subject: Chapter Annual Reports Submission to Fraternity	No. 102	Page: 1 of 4
Author: John E. White, Program Director for Social Action	Effective Date: 2/28/09	Revised Date: 5/31/2013 8/31/2015
Confirming Adoption by Signature	2/28/09	
President's Signature		
Executive Director's Signature		

PURPOSE:

To provide detail for chapters on presenting formal Annual report to Regional Office and Corporate Headquarters. To provide symmetry and alignment with the chapter assessment, awards and recognition process. To provide revision and clarification of Chapter reports process approved during Houston Conclave 1973. The annual report also serves as a tool in supporting the results of the annual chapter assessment.

POLICY STATEMENT:

As per Fraternity constitution, all Chapters are required to submit a **chapter report** on an annual basis. Chapters will be required to report in the following 5 focused areas:

- Scholarship and Academic Achievement
- Program Implementation and Reporting
- Membership Growth and Retention
- Chapter Operations
- Risk Management

REQUIRED SUBMISSION PERIOD:

All chapters are required to submit an **annual report** to the office of the Regional Director and International Headquarters by February 9th of each year. The report will cover the chapter's activities for the year just concluded (January 1st through December 31st). Each Regional Director is required to submit a list to the Corporate Headquarters for the International Standards and Awards Committee Review by March 9th of each year; the chapter report information of who turned in their chapter report to them, so it may reflect the same as headquarters.

- **During a conclave year, all Regional Directors are responsible for submitting the Regional Outstanding chapters for both alumni and collegiate by May 9th of that year to the International Standards and Awards Committee Chairman and the International Executive Director via email. The chapters submitted will compete for Model Chapter of the Year at conclave.**

- **During a non-conclave year, all Regional Directors are responsible for submitting the Regional Outstanding chapters for both alumni and collegiate by the conclusion of your Regional Conference to the International Standards & Awards Committee Chairman and the International Executive Director via email.**

ACCOUNTABILITY:

All Chapters are mandated to submit an Annual Chapter Report. Chapters who fail to present Annual Report may be suspended and/or fined by their Regional Director and International Headquarters.

EVALUATION:

The annual report will be reviewed by the respective Regional Director and evaluated by each region's Standard and Awards Committee and the International Standard and Awards Committee.

DEVELOPING THE ANNUAL REPORT:

1. Prepare a professional cover, which includes the name of your chapter, your region, College or University, City where chapter is located.
2. Ensure first page includes chapter address, officers and contact information, and chapter's email address.
3. Include Summary Report of Chapter Self Assessment Results.
4. Utilize your results of the Chapter Self Assessment Tool to report in each of the following categories:

a. *Scholarship and Academic achievement*

In this section, provide academic demographics. For example, undergraduate should list cumulative GPA and alumni chapters discuss academic performance of chapters you advise. Alumni Chapters are to share learning opportunities and special presentations that took place in chapter meetings. Alumni chapters are to also provide academic demographical information as presented in the self-assessment.

b. *Program Implementation and Reporting*

In this section the chapter is able to provide documentation on implementing Fraternity programs. The chapter is encouraged to add action photos. The chapter should also provide a summary and accountability of community service hours.

c. *Membership Growth and Retention*

In this section chapters are to provide a chapter roster, which include contact information for each member. Include total active brothers, newly initiated brothers, reinstated brothers, and transferred brothers from collegiate to alumni chapters as well as other transfers. Alumni chapters indicate career or business industry/title. Collegiate chapters, indicate classification and your career goals. Chapters are to share membership growth and strategies as well as outcomes/results of those goals and strategies.

d. Chapter Operations

This section allows the chapter to share a complete operations assessment of chapter. Use the standards included in the Chapter's Self Assessment Tool to lead your discussions.

e. Risk Management

In this section the chapter can report and document chapter risk management procedures.

OTHER REPORTING NOTES:

- Report is to be presented in two formats: printed and saved on compact disc (CD) in PDF format. All CD's and CD envelope must be properly labeled.
- Each chapter must present two copies of the printed report along with a CD for each copy. One copy must be sent to the International Headquarters and to the Regional Director.
- Printed reports should be professional binded or in folder with plastic cover.



Phi Beta Sigma Fraternity, Inc. Chapter Self Assessment Summary of Results

Name of Chapter _____
 College/University _____
 City/Community _____
 Region _____
 Chapter Address _____
 President's Name _____

Telephone _____ Email _____

Advisor's Name _____ Email _____
 (Collegiate)

Chapter Level Status*

Areas of Focus	Total Possible Points	Your Chapter Points
Scholarship and Academic Achievement	100	
Program Implementation and Reporting	300	
Membership Growth and Retention	90	
Chapter Operations	250	
Risk Management	150	
TOTAL	890	

Chapter Overall Performance Levels and Analysis	Check One
If your chapter score is 741-890+, your chapter is rated Gold Status	
If your chapter score is 641-740, your chapter is rated Silver Status	
If your chapter score is 541-640, your chapter is rated Bronze Status	
If your chapter score is below 541, your chapter is rated Marginal Status	

Chapters in Marginal Status will be placed on performance review until performance is brought up to a minimum of Bronze Status

- *Chapters are evaluated and compete for awards per chapter size
- Level I consist of chapters with active membership 40 or plus
 - Level II consist of Chapters with active membership 16 to 39
 - Level III consist of chapters with active member ship 5 to 15