

THE GUIDE FOR

SUBMITTING ANNUAL CHAPTER REPORT



Spring 2009 Edition

PURPOSE OF GUIDE AND SUBMITTING ANNUAL REPORT

- To provide detail for chapters on presenting the formal Annual Report to respective Regional Office and Corporate Headquarters as adopted by the General Board during its February 2009 General Board meeting.
- To provide symmetry and alignment with the recently adopted *Chapter Operating Standards and Awards, 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's constitution, all Chapters are required to submit a formal 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
- Chapter Special Projects, Activities and Events

REQUIRED SUBMISSION PERIOD:

All chapters are required to submit an annual report to the office of the Regional Director 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 to the Corporate Headquarters for the International Standards and Awards Committee Review by March 9th of each year.

During this first year of implementation chapters will submit the Annual Chapter Report to the office of the Regional Director at least two weeks prior to respective regional conference or by May 1, 2009. Each Regional Director will be required to review and submit annual report to Corporate Headquarters for committee review by June 1, 2009.

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.

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 CHAPTER 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 that support documentation. 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 includes 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. *Chapter Special Projects, Activities and Events*

In this section the chapter can report and document chapter signature events, special projects, and activities that do not fall under the Program Implementation and Reporting section.

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.
- Printed reports should be professional bounded or in folder with plastic cover.

