



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: 1/8/2010
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
- 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 15th of each year. Each chapter must present a printed copy of report along with a CD to respective Regional Director. An additional copy of CD to be mailed to the Corporate Headquarters to the attention to the International Standard and Awards Committee. The report will cover the chapter's activities for the year just concluded (January 1st through December 31st). Each Regional Director and/or the Regional Standard and Awards Committee is required to review annual reports by March 15th of each year.

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 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. *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 a printed copy of report along with a CD to respective Regional Director. An additional copy of CD to be mailed to the Corporate Headquarters to the attention to the International Standard and Awards Committee.
- 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	270	
Risk Management	150	
TOTAL	915	

Chapter Overall Performance Levels and Analysis	Check One
If your chapter score is 761-915+, your chapter is rated Gold Status	
If your chapter score is 661-760, your chapter is rated Silver Status	
If your chapter score is 561-660, your chapter is rated Bronze Status	
If your chapter score is below 561, 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