

*THE GUIDE FOR*  
**SUBMITTING ANNUAL CHAPTER  
REPORT**

*Spring 2009 Edition – Southwestern Region 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.
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## **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 9<sup>th</sup> of each year. The report will cover the chapters' activities for the year just concluded (January 1<sup>st</sup> through December 31<sup>st</sup>). Each Regional Director is required to submit to the Corporate Headquarters for the International Standards and Awards Committee Review by March 9<sup>th</sup> 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 regions' 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 chapters' 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 Chapters' 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 CDís 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.

## Presented Awards:

### **Outstanding Regional Collegiate Chapter**

This chapter will be judged on the following criteria: • Final score of Chapter Awards and Recognition Audit Report with Regional Director's recommendation. • Annual Chapter Report submitted by required deadline. • Degree of participation in Sigma International Programs. 3 awards are given in this area (one award for each of the 3 chapter levels).

### **Outstanding Regional Alumni Chapter**

This chapter will be judged on the following criteria: • Final score of Chapter Awards and Recognition Audit Report with Regional Director's recommendation. • Annual Chapter Report submitted by required deadline and procedures. • Degree of participation in Sigma International Programs. 3 awards are given in this area (one award for each of the 3 chapter levels).

### **THE CHARLES I. BROWN MEMORIAL AWARD**

"The Charles I. Brown Memorial Award" is to keep before the brotherhood and the public the accomplishments and deeds of Brother Charles I. Brown, only founder of the fraternity from the Southwestern Region to charter a chapter in the region, and to recognize the personal achievements of the collegiate brother in the region who has done the most during the past year to "speed our cause on its way".

### **The Argel Oatis Sigma Man of the Year Award**

"The Argel Oatis Sigma Man-of-the-Year Award" is to make known to the brotherhood and the public the personal achievements and service to community and humanity of the brother in the region who has done the most during the past year to "speed our noble cause on its way".

### **The George Washington Carver Education Award**

"The George Washington Carver Education Award" is to keep before the brotherhood and the public the accomplishments and deeds of Brother George Washington Carver, Member, Distinguished Service Chapter. Dr. Carver was a world-renowned agricultural scientist and teacher, who almost single-handedly saved the post-Civil War agricultural economy of the South. Dr. Carver made more than 300 products from peanuts and 100 or so from the sweet potato, and by doing so he revolutionized the agriculture of the South and improved the nutrition of mankind. Another purpose of the award is to recognize the service to community and the personal achievements of the brother in the region who has done what Brother Carver suggested: Learn to do common things uncommonly well; and kept in mind that anything that helps fill a dinner pail is valuable.

### **The John T. Thornton Bigger and Better Business Memorial Award**

"The John T. Thornton Bigger and Better Business Memorial Award" is to keep before the brotherhood and the public the accomplishments and deeds of Brother John T. Thornton, the first Sigma from the Southwestern Region to become a Life Member of the fraternity. In Kansas City, Brother Thornton was a member of Alpha Delta Sigma Chapter, well-known educator, charter member of the Board of Directors of Douglass State Bank, real estate developer, successful businessman and owner of the Parkview Hotel. In the late forties and early fifties, the Parkview Hotel was the largest and finest hotel for blacks in Kansas City. The 1948 SW Regional Conference was held in the Parkview Hotel. Another purpose of the

award is to recognize the service to community, and the personal and corporate achievements of an individual(s) or organization in business for profit.

#### **The Ulysses S. McPherson Athletic Award**

“The Ulysses S. McPherson Athletic Award” is to keep before the brotherhood and the public the accomplishments and deeds of Brother Ulysses S. McPherson, Member, Distinguished Service Chapter. For many years, Brother Dr. McPherson distinguished himself as a winning head football coach, and competent athletic director at a number of colleges and universities across the country. In the collegiate sports world, “Mac” was known as “the tough coach who made athletes”. Brother McPherson is the fraternity’s first National Athletic and Sports Commissioner. Another purpose of the award is to recognize the service to community, and the personal achievements of the brother in the region who has excelled exceedingly in collegiate athletics and sports.

#### **The Daniel McDaniels Educator of the Year Award**

“The Daniel McDaniels Educator-of-the-Year Award” is to keep before the brotherhood and the public the accomplishments and deeds of Brother Dr. Daniel McDaniels. Brother McDaniels is a charter member of Zeta Omicron Sigma Chapter, Life Member, and recipient of many Sigma service awards. He is a well-known and respected educator in the Kansas City, Missouri School District. Colleagues of “Mac” cite him for being “a teacher who can get students to achieve”. Another purpose of the award is to recognize the service to community, and the personal achievements of the individual in the region who has done the most to help youngsters and students learn the things they should; excel to their highest potential, and has helped to maintain a quality education program.

#### **The Best Education Award**

“The Best Education Program Award” is to keep before the public the fact that Phi Beta Sigma Fraternity has been concerned about public quality education for all people of these United States, scholastic achievement and career development since 1920, make known to the nation, especially this region of the country, the things that Phi Beta Sigma are doing now to advance the cause of excellence in education, and to honor and give recognition to the chapter in the region that has sponsored the most outstanding Education/Scholarship Program during the past year.

#### **The Best Bigger & Better Business Award**

“The Best Bigger and Better Business Program Award” is to keep before the public the fact that Phi Beta Sigma Fraternity has been concerned about minority and small businesses since 1925, make known to the nation, especially this region of the country, the things that Phi Beta Sigma are doing now to advance the causes of minority enterprises, and to honor and give recognition to the chapter in the region that has sponsored the most outstanding Bigger and Better Business program during the past year.

#### **The Best Social Action Program Award**

“The Best Social Action Program Award” is to keep before the public the awareness that Phi Beta Sigma Fraternity has been concerned about first-class citizenship, equal employment opportunities, fair/open housing, segregated schools, civil rights and social change for blacks and other minorities since 1934, make known to the nation, especially this region of the country, the things that Phi Beta Sigma Fraternity are doing now to advance the cause of “liberty and justice for all,” and to honor and give recognition to the chapter in the region that has sponsored the most outstanding Social Action Program during the past year.