

## Chapter Performance Report Checklist

Thank you for taking the time to prepare your annual Chapter Performance Report. Here are some guidelines from the Chapter Accreditation Committee:

- Make sure the report is the 2009-2010 Chapter Performance Report (noted in footer) as some changes have been made since last year.
- The report MUST be typewritten.
- Use only the format provided.
- Do not delete the question and number.
- Provide answers to each question.
- Check grammar and spelling.
- Review the report with the Chapter Council, Advisor
- Attach all supporting documentation as requested (see list below).

Please make sure the following information is attached (credit is not given without documentation):

### REQUIRED

- Roster.
- Candidate Education Program – including agendas, handouts, tests, etc.
- Chapter Budget.
- Completed IRS Form 990.
- Member Accounts Receivable.
- Fire Evacuation Plan (if housed)
- GPA documentation from the university. If not yet received or provided by the institution, please attach all member unofficial transcripts and excel file with Chapter GPA Calculation. Also include a letter from the university stating when the grades will be available.
- Copy of the check or provide the check number given to the Alzheimer's Association.
- Copy of the check or provide the check number given to other charitable organizations.

### IF APPLICABLE

- Letter to Parents of Candidates.
- Copies of Alumni Newsletters that have been mailed and/or emailed.
- Letter to Octagon appointing Chapter Advisor / Advisory Board.
- "Thank you" letters or acknowledgements received for philanthropic events.
- Sample Monthly Financial Statement to Members.
- Chapter articles in the Octagonian.
- Chapter articles in newspapers or other media.

This report will be used to determine overall chapter accomplishment for the past academic year. **All chapter awards will be determined based upon the information provided in this report.** Reports must be filed by each chapter by June 1st (semester schools) and June 30th (quarter schools). **Chapters which do not submit a report will not be eligible for awards and may face disciplinary action.** The Fraternity's Chapter Accreditation Committee will score the Chapter Performance Report. The average score will determine the chapter's standing with the Fraternity:

Founders Level                      90-100

*Groups attaining this level of excellence are our healthiest. These groups are eligible for the Founder's Cup.*

Octagon Level                      70-89

*These groups are at an acceptable level in order to remain an active chapter in Sigma Alpha Mu.*

Alumni Receivership              69 and below

*This is a probationary status. Chapters in Alumni Receivership have one academic year to improve their chapter performance score to either Octagon or Founders Level. Alumni Receivership means that the chapter's alumni will receive specific charter and be expected to work, along with staff, Regional Governor, and the Octagon, with the chapter to increase its standing. If, after a year, the chapter can not move beyond Alumni Receivership, the Octagon will have the option to reorganize, suspend, or close the chapter.*