1: Report Contact Information

- University / School
- Chapter Name
- Region
  - Region 1: Northeast & Atlantic Coast (MA, MD, NH, PA, VA, VT, WV)
  - Region 2: South/Southeast (AL, AR, FL, GA, KY, LA, MS, NC, TN, SC)
  - Region 3: Midwest-East (MI, OH, IN)
  - Region 4: Midwest-West (IA, IL, MN, ND, NE, SD, WI)
  - Region 5: Great Plains South/Southwest (AZ, KS, MO, NM, OK, TX)
  - Region 6: Rocky Mountain & Pacific (CA, HI, ID, MT, OR, UT, WA, WY)
- Person Completing the Report
- Officer/Advisor Position
- Email & Phone Number
- Chapter Website (if applicable)
- Chapter Instagram Handle (if applicable)
- Chapter Facebook Handle (if applicable)
2: Upcoming Chapter Officers

- List the names, email address, phone number and member type (new member/continuing senior) for the following positions:
  - President
  - Vice President
  - Secretary
  - Treasurer
  - Membership Chair
  - Historian
  - Alumni Relations

- *If your chapter has additional officers, add the same information for them along with their titles.*

3: Advisor Information

- List the following information for all advisors:
  - Name
  - Institutional Title
  - Mailing Address
  - Email Address
  - Phone Number
  - Will they be advisor next year? (yes, no, maybe)
4: Chapter Goals & Advice for Future Leaders

Refer to your Chapter Action Plan from the fall, if possible

- Please describe how you achieved your goals and/or where you faced challenges.
- What advice do you have for next year's officers and advisors?

5: Chapter Minimum Standards

- Briefly describe your tapping process. What unique traditions do you have?
- Do you hold orientation for new members and how was it held?
- Briefly describe your initiation ceremony. What unique traditions do you have? Was it in person, hybrid, or virtual?
- Did you transition your new officers yet?
6: Section Coordinators (SC)

- How would you characterize the support you received from your Section Coordinators?
- In what ways would you like to see the Section Coordinator role expanded to better assist with chapters?
- Additional comments about your Section Coordinators

7: Mortar Board National Office

- Check all of the following you found helpful this year:
  - www.mortarboard.org, Mortar Board National Conference, Special National Conference (SNC), Chapter Operations workshops/recordings, National Virtual Initiations, Online templates and samples, Local alumni chapter, The Mortar Board Forum magazine, Communication with Section Coordinator, Communication with National Office staff, Communication with National Council or National Foundation, Bylaws of Mortar Board, Member Selection Handbook, Initiation Handbook, Officer/Advisor Handbook, Reading is Leading Resource Guide, DEI Tool Kit, Mortar Board MBits e-newsletter, Local Chapter Websites and Resources, Instagram, Facebook, LinkedIn, Twitter, Slack

- What do you think the National Office could do to better support your chapter?
8: Events & Programs

- Did your chapter take steps to increase your commitment to DEIB (diversity, equity, inclusion, & belonging) as a chapter?
- Did your chapter hold a fundraiser?
- Did your chapter actively engage with alumni members?
- Did you partner with offices/organizations on campus? If yes, which offices?
- Please list your 2022-2023 programs and activities.

9: Conference Information

- Have the student(s) attending the National Conference (virtual) been identified?
- Are you planning to have an advisor attend the National Conference (virtual)?
- What topics would you like to see covered at the National Conference or during programming throughout the year?
10: Chapter Finance Report

- Where is your bank account held? (on-campus, off-campus, both, no account)
- If off-campus, what bank?
- Is your chapter eligible for student government funding?
- Chapter Opening Balance (as of June 2022)
- Chapter Closing Balance (as of May 2023)
- Is there anything you'd like Mortar Board to know about your financial situation? (unexpected revenue/expenses, unspent funds, questions about funding, etc)

11. Chapter Historian Report

- Do you have a documented written chapter history? If yes, where is it held?
- Do you have a permanent chapter history contact (advisor, college/university administrator, archivist, etc)? If yes, please list their name, email, and relationship to the chapter.
- Describe any changes or events that made this year significant in your chapter's history.
- Please provide chapter photos and/or videos from this year.
Chapter Awards

• Do you plan to apply for Excellence in Advising, Ruth Weimer Mount Chapter Excellence, or Freeman and Fox Most Improved Chapter Awards? (separate applications)

Gold Torch
• Would you like to be considered? (yes/no)
• (If yes) Explain how your chapter has excelled in the areas of scholarship, leadership, and service to the alma mater (be sure all three areas are included).

Project Excellence Awards
• Would you like to be considered? (yes/no)
• Which awards would you like to be considered for?
  ○ Scholarship, Leadership, Service to the alma mater, Fundraising, Alumni involvement, Community service, Reading is Leading, Mortar Board Week
• Provide a brief summary of the project/initiative for each award you'd like to apply. Include a project description (cost, number of people involved, promotion, etc), how the project excelled in the areas above, and what the positive impact was as a result of the program.
• If you'd like to upload the information and/or supporting documents, please attach.

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Chapter Awards (continued)

**DEI&B Award**
- Would you like to be considered? (yes/no)
- In which of the following areas has your DEI&B project/initiative excelled? (Please check all that apply)
  - Scholarship, Leadership, Service to alma mater, Service to the greater community, Recruitment & membership selection, Alumni involvement, Reading is Leading, Mortar Board Week, Partnerships with other groups/organizations
- Describe the project/initiative. What was its impact? What opportunities or challenges were encountered?
- If possible, please attach videos, pictures, or other files that visually support your project/initiative.

**Outstanding Achievement Awards**
- Would you like to be considered? (yes/no)
- Which awards would you like to be considered for? (check all that apply)
  - Recruitment & Selection, Officer/Advisor Transition, Chapter Reactivation, Campus Visibility, Chapter Communication
- Provide a brief summary of how your chapter made great strides in the above areas.

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