

1: Report Contact Information

- University / School
- Chapter Name
- Region
 - Region 1: Northeast & Atlantic Coast (MA, MD, NC, NH, PA, VA, VT, WV)
 - Region 2: South/Southeast (AL, AR, FL, GA, KY, LA, MS, 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)





MORTAR BOARD

2: Upcoming Chapter Officers & Members

- List the names, email addresses, phone numbers, and member types (new member/continuing student) for the following positions for Fall 2026 & Spring 2027
 - 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.*
- *Upload a list of Returning/Continuing Students (no charge for additional years) OR request a list be sent so you can verify*

3: Advisor Information

- List the following information for all 2026-2027 advisors:
 - Name
 - Institutional Title
 - Email Address
 - Phone Number
 - Were they an advisor last year (2025-2026)?





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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; how was it held?
- Briefly describe your initiation ceremony. What unique traditions do you have? Was it in person, hybrid, or virtual?
- Does your chapter have a roll book?
- Did you transition your new officers yet?

6: Region Coordinators (RC)

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





MORTAR BOARD

7: Mortar Board National Office

- Check all of the following resources you found helpful this year (options provided)
- 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 inclusive excellence and belonging as a chapter?
- Did your chapter hold a fundraiser?
- Did your chapter hold a faculty/staff/student recognition initiative?
- Did your chapter actively engage with alumni members?
- Did you partner with offices/organizations on campus? If yes, which offices?
- If you were to estimate the total number of community service hours your chapter completed, how many hours did your chapter complete this academic year?
- Please list your 2025-2026 programs and activities.
- Did your chapter participate in the Week of Service (October)? *If yes, estimate the number of participants and service hours.*



9: Chapter Health

- Please rate your chapter's health in the following areas:
(*Excellent, Good, Fair, Struggling, Need Immediate Help, Unsure*)
 - **Membership** (amount of applications, yield from candidates to paid members)
 - **Activities** (holds activities around scholarship, leadership, service, campus recognition)
 - **Financial** (pays national dues, holds fundraisers, has adequate funds for activities)
 - **Advisors** (at least one committed advisor, advisor feels supported/trained in their role)
 - **Officers** (strong executive board, e-board feels supported/trained in their role)
 - **Member Engagement** (members participate in activities and meetings)
- What percentage of chapter is currently active?
- Did you allow rising juniors to join this year?

10: Conference Information

- Have the student(s) attending the National Conference (Sept 25-27, 2026; Columbus, Ohio) been identified?



11: 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 May 2025)
- Chapter Closing Balance (as of May 2026)
- If your chapter does fundraising, how many fundraisers did you do and how much total money was raised? (estimate)
- Is there anything you'd like Mortar Board to know about your financial situation? (unexpected revenue/expenses, unspent funds, questions about funding, etc)

12. 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.





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Chapter Awards (OPTIONAL)

- Do you plan to apply for Ruth Weimer Mount Chapter Excellence, Freeman and Fox Most Improved Chapter Awards, Excellence in Advising, or Starlington Prize? (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.



Chapter Awards (continued)

Inclusive Excellence Award

- Would you like to be considered? (yes/no)
- In which of the following areas has your Inclusive Excellence 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, Week of Service, 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, Tapping, Chapter Communication, Digital Communication
- Provide a brief summary of how your chapter made great strides in the above areas.