



## Phi Eta Sigma Chapter Excellence Recognition

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The pyramid on the Phi Eta Sigma Honor Society crest symbolizes strength, stability, and long-standing tradition. The Phi Eta Sigma Executive Committee introduced the Pyramid and Capstone excellence awards to recognize strong chapters that build on the foundation of the Phi Eta Sigma principles of outreach and growth.

Chapters may earn Pyramid status each year by meeting the requirements below and will receive a certificate of achievement and publicized recognition in the FORUM, as well as on our national website and social media pages.

In addition, a sub-committee of the Executive Committee will select three Capstone Award chapters from among the Pyramid chapters. Capstone chapters receive a certificate of achievement and publicized recognition, as well as a cash award of \$100.

All active chapters are considered for Pyramid status. Only those chapters awarded Capstone in the two previous years are not eligible for a consecutive Capstone award.

Chapter Name: \_\_\_\_\_ Please submit all items below by July 15.

Please indicate the number of copies of the *Forum* magazine you want delivered to your campus address next January. The quantity you request should be an estimate of the number of copies you plan to distribute to chapter members, especially new inductees, during the next calendar year. **\*If you do not specify a quantity or indicate you want the electronic version only, you will be invoiced for shipping charges on any *Forum* copies you return to the printer.**

Forum Order Quantity: \_\_\_\_\_

**Chapter prefers to receive the *Forum* as electronic version only:** \_\_\_\_\_ (Check if you agree)

The following three pages outline the requirements for receiving excellence awards and space to track progress towards meeting those requirements.

## Pyramid Award Requirements



- Hold at least one induction during each academic year (July 1-June 30). Induction date: \_\_\_\_\_
- Maintain number of inductees from previous year—Equal or increased enrollment, or minimal decrease ( $\leq$  20% of membership; for membership of 40 or less, loss  $\leq$  4 members)
- Submit chapter annual report to national office by July 15. *See page 4 of this form.*
- Meet IRS compliance. Adviser will receive emails from the national office regarding filing in the spring semester.
- Maintain current adviser contact information with national office. In the event of an address or leadership change, please contact us.
- Efficient, timely interaction with national concerning membership and merchandise orders (submission of records at least two weeks prior to induction date).
- Submit one or more scholarship applications by the May 1 deadline.
- Submit list of chapter officers for current or upcoming year:

Office	First and Last Name	Email Address
President		
Vice President		
Secretary		
Treasurer		
Historian/Correspondent		
Sr/Jr Adviser		
Other (please specify)		
Other (please specify)		
Other (please specify)		

- Hold one or more chapter meetings each semester and record below.

Meeting Date	Meeting emphasis, program focus, major actions taken

## Capstone Award Requirements

- All above Pyramid requirements must be met
- Increase number of inductees by at least 5% over a 3-year period, with no loss in a single year of more than 10%
- Submit two or more scholarship applications by the May 1 deadline
- Participation by one or more chapter representatives (adviser &/or student members) at most recent past national convention or at a regional conference within past 2 academic years
- No past-due balance on chapter account with national office. Please contact the national office if you would like to confirm this for your chapter.
- Conduct one or more service or leadership development event(s)/project(s) during the academic year.

Event Date	Event Title	Brief Description	# of Members Involved

\*If you held a fundraiser for the Phi Eta Sigma national philanthropy or a local charity, please document the activity and report it to national, including the amount of funds raised. Also, be sure to report funds raised & dispersed, as well as any local scholarships awarded, with financial information on the chapter annual report.

- Report news & activities to national office for use in FORUM & online media at least once during the academic year. Note date sent here: \_\_\_\_\_

Please submit an email or Word document describing the various activities and projects of your local chapter for inclusion in the next issue of the *Forum* magazine. Include news of meetings, guest speakers, awards and accomplishments of chapter members, social events, community service projects, participation with other organizations in campus functions, etc. If available, please attach photos of activities and events that may be published also.

\*News and digital photos may be uploaded through the Adviser Resources area of our website, [www.phietasigma.org](http://www.phietasigma.org), or sent by email to [phi.eta.sigma@wku.edu](mailto:phi.eta.sigma@wku.edu)

Please limit your submission to approximately 400 words unless you have been asked to submit a feature article. Digital photos (high resolution if possible) of your chapter events are also welcome.

*\*News and photos may be submitted to national office until October 1 for publishing in FORUM magazine.*

*\*Please submit by  
July 15, 2019*

*Return to: phi.eta.sigma@wku.edu  
Elaine J. Powell  
Phi Eta Sigma Honor Society, WKU  
1906 College Hts. Blvd. #11062  
Bowling Green, KY 42101-1062*

**PHI ETA SIGMA  
CHAPTER ANNUAL REPORT**

*(Required for all chapters of Phi Eta Sigma to submit annually)*

Name of School \_\_\_\_\_

Chapter Adviser (include Dr., Mr., Ms., etc.) \_\_\_\_\_

Adviser's Campus Mailing Address: \_\_\_\_\_ Shipping Address if different: (no P.O. box please) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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\_\_\_\_\_

\_\_\_\_\_

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Adviser's Telephone: \_\_\_\_\_

Adviser's Email: \_\_\_\_\_

Additional Chapter Contact Information (if applicable)

Co-Adviser: \_\_\_\_\_

Admin. Support Person: \_\_\_\_\_

Telephone: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Email: \_\_\_\_\_

**Chapter Financial Reporting for 2018-2019—**

**Chapter's Federal EIN (taxpayer identification number):** \_\_\_\_\_

*\*If your chapter will not be included in the Phi Eta Sigma group tax return, you must file separately or be included on another group return. Please specify below how your chapter files:*

\_\_\_\_\_ Chapter files separately – Form 990, 990-N, or 990-EZ

\_\_\_\_\_ Files as part of another group return – Name of group \_\_\_\_\_

\_\_\_\_\_ Files as part of Phi Eta Sigma group exemption

Information in the section below is **required** if you previously authorized Phi Eta Sigma national to include your chapter in its group tax return for the IRS. Any chapter that does not submit this information by the **July 15 deadline** will not be listed on Phi Eta Sigma's group filing for this year. All Phi Eta Sigma chapters are requested to complete this section for general information, regardless of how the chapter files with the IRS.

Cash balance as of 7/1/2018: \$ \_\_\_\_\_

Income:

Induction fees \$ \_\_\_\_\_

Investments \$ \_\_\_\_\_

Fundraising/donations \$ \_\_\_\_\_

**Plus:** Total Income \$ \_\_\_\_\_

Disbursements:

Operating expenses\* \$ \_\_\_\_\_

National induction fees paid \$ \_\_\_\_\_

Local scholarships awarded \$ \_\_\_\_\_

**Minus:** Total Disbursements \$ \_\_\_\_\_

**Cash balance as of 6/30/2019:** \$ \_\_\_\_\_

Number of local scholarships awarded \_\_\_\_\_

*\*If Operating Expenses exceed \$100, please attach a breakdown of the various expenses (i.e. postage, printing, catering, etc.).*

Signature of adviser or reporting officer: \_\_\_\_\_

Position held: \_\_\_\_\_

Date: \_\_\_\_\_