
Local Chapter Annual Business Report

Hamden L. Forkner Award

Business reports are used extensively to inform management, staff, stockholders, and the general public about all aspects of the business. The Hamden L. Forkner Award recognizes FBLA chapters that effectively summarize their year's activities. The event provides participants with valuable experience in preparing annual business reports.

Report Purpose

The report should summarize the activities of the local chapter between the start of the previous State Leadership Conference and the start of the current State Leadership Conference. Projects used for other FBLA reports may be included. The report should include the chapter's profile, productivity, recognition, and business procedures.

Career Cluster(s):

Business, Management, and Administration; Finance; Information Technology; Marketing, Sales and Service

Business Education Curriculum Standard(s):

Communication, Information Technology, Marketing

State Eligibility

Each local chapter may enter one (1) report. The local chapter must be on record in the Pennsylvania state and the FBLA-PBL national offices as having paid dues by January 31 of the current school year. This is a chapter recognition event only; therefore, no members qualify to attend the State Leadership Conference as Local Chapter Annual Business Report participants. However, any member who assisted with the preparation of the report is eligible to compete in another individual or team event.

State Regulations

Written Report

1. Report formats **must** follow the same sequence shown on the rating sheet below for this event. If information is not available for a particular criterion, include a statement to that effect in the report. The report must be similar to that of a business report with substantiated statements in a clear and concise format.
2. Written reports **must** adhere to the following technical requirements. Penalty points will be given if the written project doesn't adhere to the guidelines.

A. Report Contents

- (1) Reports **must** contain a table of contents with page numbers. A title page, divider pages, and appendices are optional.
- (2) Report pages **must** be numbered.
- (3) Reports **must not** exceed thirty pages, including the title page, table of contents, divider pages, and appendices. Front and back covers are not counted in the page limit.
- (4) Pages **must** be standard 8 ½" x 11" paper.
- (5) Pages **must not** be laminated or bound in sheet protectors.
- (6) Reports may be single- or double-spaced.
- (7) Each side of the paper providing information **is** counted as a page.
- (8) Valuable items **must not** be included with the report. Copies should be sent rather than important original documents.
- (9) No items may be attached to any page in the report. Scrapbooks and loose or bulky exhibits **are not** acceptable.
- (10) Follow the rating sheet sequence in writing the report. If information is not available for a particular criterion, include a statement to that effect in the report.

B. Report Covers

- (1) Both a front and back cover **are** required.

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- (2) Report covers **must** contain the following information: the name of the school, the state chapter, the name of the event, and the year (20xx-20xx). Report covers may also contain additional information.
 - (3) Report covers **must** be of a weight such as cover stock, index stock, or card stock.
 - (4) Covers **must not** be in plastic binders, be laminated, or have a plastic sheet overlaying the printed cover.
 - (5) Cut out stock covers are allowed, but the page containing the cover information is counted in the page count.
 - (6) Two- or three-ring binders **are not** acceptable as report covers.
 - (7) No items, such as labels or decals, may be attached to the front cover.
 - (8) Report covers **must not** exceed 9 1/2" x 12".
 - (9) All reports **must** be bound (e.g. tape binding, spiral binding).
 - (10) Report covers are not counted against the page limit.
3. Creativity through design and meaningful graphics is encouraged.
 4. Reports must be prepared by student members, not advisers. Local chapter advisers should serve as consultants to ensure that the report is well organized, contains substantiated statements, and is written in an acceptable business style.
 5. Reports must describe activities of the chapter that were conducted between the start of the previous State Leadership Conference and the start of the current State Leadership Conference.
 6. The event is prejudged before the SLC.

State Procedure

Preconference Requirements

1. The participant(s) must submit the following items:
 - a. An event entry form, which is posted on the PA FBLA web site, certified by the local chapter adviser.
 - b. Four (4) copies of the written report.
2. **The materials must be received by the PA FBLA Executive Director/State Chairman by the deadline date published at www.pafbla.org/importantdates.php, which is posted on the PA FBLA web site. Failure to submit these documents by the received by date will result in the participants being disqualified.**

Conference Requirements

Oral Presentation

There is no oral presentation at the State Leadership Conference.

State Judging

Reports will be screened to determine if chapters have complied with event eligibility and regulations. A panel of judges will then select the winners, and all decisions of the judges are final. Ties will be broken based on the following:

First Tiebreaker

- Total points of the *Productivity* section on the rating sheet.

Second Tiebreaker

- Total points of the *Format* section on the rating sheet.

Third Tiebreaker

- Total points of the *Businesslike Procedures* section on the rating sheet.

State Awards

The state will present a maximum of ten (10) awards at the State Leadership Conference.

National Conference Eligibility

The first- and second-place award winning reports at the State Leadership Conference are eligible for entry at the National Leadership Conference.

In the event that the local chapter of the first- or second-place winning report does not wish to have its report submitted for competition at the National Leadership Conference, it is the responsibility of the:

local chapter adviser

- to contact the PA FBLA Executive Director/State Chairman about not participating at the National Leadership Conference.

PA FBLA Executive Director/State Chairman

- to contact the next eligible award winner about participating at the National Leadership Conference.



LOCAL CHAPTER ANNUAL BUSINESS REPORT

Report Rating Sheet

Evaluation Item	Not Demonstrated	Does Not Meet Expectations	Meets Expectations	Exceeds Expectations	Points Earned
Chapter Profile					
Letter to chapter membership (stockholders)	0	1-2	3-4	5	
Chapter Information Included • Number of members • Size of school and community • When and where the chapter was organized	0	1-2	3-4	5	
Productivity					
Recruitment of members and chapters	0	1-2	3-4	5	
Leadership development for officers and members	0	1-3	4-7	8-10	
Preparation of students for business careers	0	1-2	3-4	5	
Service to the school and community	0	1-3	4-7	8-10	
Cooperation with business, professional, and service groups	0	1-2	3-4	5	
Participation in public relations and activities	0	1-2	3-4	5	
Support of FBLA national and state projects	0	1-2	3-4	5	
Attendance and participation at state and nationally sponsored conferences	0	1-2	3-4	5	
Recognition					
For FBLA competitive events and activities	0	1-2	3-4	5	
For school, community, business, and industry activities	0	1-2	3-4	5	
Businesslike Procedures					
Chapter management and organization	0	1-2	3-4	5	
Financial development, including fund-raising and financial statement	0	1-2	3-4	5	
Format of Report					
Clear and concise presentation with logical arrangement of information following the rating sheet categories	0	1-3	4-7	8-10	
Correct grammar, punctuation, spelling, and acceptable business style	0	1-2	3-4	5	
Design and graphics	0	1-2	3-4	5	
Subtotal					/100 max.
Penalty Points: Deduct five (5) points each for not adhering to Report Guidelines (maximum of twenty [20] points): <input type="checkbox"/> cover incorrect <input type="checkbox"/> missing table of contents & page numbers <input type="checkbox"/> binding incorrect <input type="checkbox"/> over thirty (30) pages <input type="checkbox"/> pasted items <input type="checkbox"/> no page numbers in report <input type="checkbox"/> 4 copies of report not received <input type="checkbox"/> report format does not follow rating sheet _____					
Total Points					/100 max.

School: _____ Region: _____

Judge's Signature: _____ Date: _____

Judge's Comments: _____

VERIFICATION & INITIALS
(scores checked for accuracy)

Co-Competitive Events Coordinator _____