



Annual Check-In Report

The Annual Check-In Report is a health checkpoint of the chapter's or region's governance and business practices and allows CSI National to confirm that the chapter or region is in good standing with the elements of the [Affiliation Agreement](#).

If the chapter or region is unable to meet one or more of the obligations on the report, the Chapter, Region, and National will work collaboratively to create a plan so that the chapter or region can work towards compliance with the [Affiliation Agreement](#).

Please be prepared to complete the form as progress cannot be saved or the link shared with multiple leaders; Proof is not required, your attestation is enough.

This report is the starting point for our conversations to support you **and is due by September 30, 2023.**

Note: There are two certification prep questions that do not relate to compliance with the affiliation agreement. These are for information gathering as we seek to understand what certification preparation courses are or may become available to the AECO community.

Please reach out to chapterrelations@csinet.org with any questions or concerns.


Submitting Leader Information

First Name *

Last Name *

Email Address *

Chapter Information

Select your chapter/region * 

Please attest the following for the chapter and any subsidiary or related entities (i.e., foundation)

Is your chapter recognized as a current, valid, legal entity in the state in which you are incorporated? *

Is your chapter recognized as exempt from federal tax under Section 501(c) of the Internal Revenue Code per IRS.gov *

Does your chapter have D&O insurance in place? *

Does your chapter have General Liability insurance in place? *

Did the chapter or region hold any certification preparation coursework in FY22-23? *


Does the chapter or region plan to hold certification preparation coursework in FY23-24? *


Enabling Documents

For reference: Enabling documents include the Bylaws, Articles of Incorporation or business license, and IRS determination letter of tax-exempt status.

Have any of the chapter's or region's enabling document changed in previous fiscal year? *

- Yes
- No

Financial documents from previous fiscal year * 

New member recruitment and customer lists * 

Submit