



Beta Eta Alumni Chapter, Inc.

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June 18, 2008

Mark E. Timmes, CEO
Pi Kappa Phi Fraternity
P.O. Box 240526
Charlotte, NC 28224

Re: Application for Alumni Chapter of the Year

Dear Mark:

I write on behalf of the Board of Directors for the Beta Eta Alumni Chapter, Inc. (BHAC) and 185 dues paid members of the BHAC in submitting this application for Pi Kappa Phi Fraternity's Alumni Chapter of the Year Award for 2008. We believe that the BHAC is worthy of this award due to the tremendous strides we have taken and success achieved during the past year.

For historical context, I will begin with a brief summary of our organization. The BHAC was established during a strategic planning retreat held January 7-9, 2005, in Charlotte, North Carolina, in conjunction with Pi Kappa Phi's Mid-Year Leadership Conference. Eleven dedicated alumni, representing several different generations of Beta Eta alumni, traveled to Charlotte to attend the retreat in an effort to examine and strategize an alumni outreach plan for Beta Eta. Those alumni, each successful in their own right, brought varied skill sets and life experiences to the retreat. They determined that an organization should be created that assisted Beta Eta alumni with reconnecting and communicating with one another, promoted the values of Pi Kappa Phi as expressed in its Ritual of Initiation and Supreme Laws, and took into consideration the geographical diversity of Beta Eta alumni. By the close of that weekend retreat, the BHAC was organized as a Florida not-for-profit corporation (including the election of directors and officers), a mission statement was adopted, bylaws were reviewed, a petition to the National Fraternity was signed, and a strategic plan for the upcoming year was created.

**Beta Eta
Alumni Chapter, Inc.**

President

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Vice President

Brian Baber '92

Treasurer

Lee Nichols '87

Secretary

Jeff Niedenthal '67

Directors

Chuck Cutajar '62

Frank Kaney '55

Roger Randolph '57

The Board of Directors for the BHAC adopted a mission statement to reflect its goals and priorities:

The mission of the Beta Eta Alumni Chapter is to enhance the lifelong fraternal experience for Beta Eta alumni by maintaining an active alumni group that is dedicated to connecting alumni with each other and to their fraternity by providing timely communication of relevant alumni news and organizing meaningful events. This group shall promote the ideals of the Pi Kappa Phi Fraternity as expressed in our Ritual of Initiation and Supreme Laws and encourage Beta Eta alumni to renew their lifetime pledge to the brotherhood of this fraternity.

This mission statement evolved into three primary goals by which the BHAC measures its success:

1. Providing meaningful and timely communication of alumni related news;
2. Organizing at least one meaningful alumni event per year; and
3. Reaching out to graduating seniors of the undergraduate chapter to reinforce the belief that fraternity does not end when you claim your diploma, but, rather, it is a lifetime commitment to uphold the values of Pi Kappa Phi and maintain the brotherhood for future generations. While the Beta Eta Student Chapter was closed over the past year, as discussed below, the BHAC supplanted this goal by engaging in an unprecedented effort to assist the National Fraternity succeed with its re-colonization of Beta Eta in Fall 2008.

I will address our efforts to achieve these goals in seriatim.

1. Communications with Alumni

The cornerstone of the BHAC's communication efforts is our alumni newsletter, the *Beta Eta Data*. The *Beta Eta Data* is distributed by e-mail and mail to all alumni three times per year (including our upcoming summer edition in July). When the BHAC resurrected the *Beta Eta Data* in 2005 – after a four-year dormancy – the newsletter was revamped to focus more on alumni news and events. The *Beta Eta Data* now includes a noteworthy lead story, an alumni spotlight, recaps of BHAC sponsored events, a “remember when” photo, articles regarding alumni involvement in the community, alumni updates with pictures, a Chapter Eternal report, and the BHAC and Housing Corporation's annual reports (including an annual membership roster).

While the *Beta Eta Data* is one of Pi Kappa Phi's leading alumni newsletters¹, we have made constant efforts to increase our publication's high quality nature and readership. Not content to let the newsletter become stale with routine fraternity features, our volunteer writers have constantly expanded their topics to find noteworthy subjects to increase our publication's journalistic nature. In short, we want our newsletter to be enjoyed by our alumni and their family members. Past editions have contained an in-depth interview with three DC-based political insiders concerning a variety of challenging issues (Spring 2008) and a spotlight featuring an alumnus creating a unique approach to building healthcare infrastructure and provider networks in emerging, third-world nations in order to facilitate efficient and effective primary care and chronic disease management (Summer 2007). We learned that this level of reporting creates a higher level of discussion and interest amongst our alumni base as expressed during our various alumni events.

Moreover, in light of our student chapter's closure, the BHAC has embarked on an effort to educate and motivate our alumni about Pi Kappa Phi's expansion plan for Beta Eta. Since the chapter was closed in March 2006, we have dedicated the space normally reserved for the student chapter report to an article in each *Beta Eta Data* issue concerning the upcoming expansion. By breaking the entire expansion and chartering process into digestible and regular feature stories, we are able to educate our alumni as to how the expansion will be conducted and what roles alumni can play within that process and directly with the new student group. Topics have included the challenges the new colony will face, how the national staff recruit men, minimum chartering standards, and alumni involvement with the expansion, chartering, and advising the new colony. Future articles will include alumni involvement with the chartering and a feature story about the national staff running the expansion efforts. As this knowledge base was built, we then began to solicit alumni (as discussed below) to participate and contribute to the expansion efforts. We realized this type of feature story was unique, so we have forwarded each issue to Tom Sullivan, who serves as the Volunteer Chairman of the Expansion Committee, and Woody Woodcock, Director of Expansion, so that they can distribute such content to other alumni groups as they deem appropriate. It is our hope that Beta Eta is creating a template that can be utilized by other alumni organizations prior to expansions to enhance support for new student chapters.

The BHAC has also advanced its alumni communications platform by creating a comprehensive website (www.BetaEta.com) for all Beta Eta alumni to enjoy. We recruited a committee of 7 alumni with marketing and website development experience to oversee the development of the website. The BHAC Board understood the challenges it faced creating a web page for our alumni given the wide range of ages within our constituency and their internet abilities, and took these issues into account during the design phase. We wanted everyone to feel welcome when they visit *BetaEta.com*. Having personally reviewed over 15 other alumni chapter websites, I can personally attest that *BetaEta.com* is the most

¹ The *Beta Eta Data* was awarded the "Alumni Newsletter of the Year" for 2006.

comprehensive, informative, and user friendly website within Pi Kappa Phi. We hope it serves as a model for other groups to emulate, which the Epsilon Alpha Alumni Chapter has apparently already done.

BetaEta.com was designed to (1) promote our events; (2) document the unique history of Beta Eta; (3) recognize the contributions of Beta Eta alumni to Florida State University, Pi Kappa Phi Fraternity and Push America; (4) facilitate communications with and between our alumni; and (5) foster an atmosphere of transparency and accountability for the BHAC and Housing Corporation. When visiting the website, alumni can view information about upcoming BHAC sponsored events, corporate documents for both the BHAC and the BHHC (including bylaws, articles of incorporation, and directors' contact data), photos from previous events, past editions of the *Beta Eta Data*, information on BHAC membership, a listing of all brothers initiated into Beta Eta and their current status, as well as the ability to update their personal information online. Since the site went live last summer, over 50 alumni have used *BetaEta.com* to update their personal contact information, which we then forward to the National Fraternity. Lastly, as discussed below, the website will serve as a recruitment device for the upcoming expansion.

2. Alumni Events

With a stated goal of organizing one quality alumni event per year, the BHAC has far surpassed its own expectations. From Day One of our existence, the BHAC recognized the challenges posed by Tallahassee's geographical isolation (a 3 hour drive from the nearest sizeable city) and the concentration of our alumni in other locations. This challenge was exacerbated by the closing of the student chapter in March 2006. Accordingly, we crafted our approach to take fraternity to where our members reside. This decentralized approach required additional volunteer work and creativity for event planning.

The two central pieces for our alumni event programming are the BHAC's Annual Meeting and FSU's Homecoming. This year's Annual Meeting was held in Jacksonville, FL (prior years were hosted in Tampa and Orlando) at the Crowne Plaza Riverfront Hotel.² The meeting was followed by a cocktail reception and then a group dinner at the Jacksonville Landing. The meeting was well attended and, as in prior years, alumni traveled to the event from throughout the Southeast. (In fact, the majority of alumni present did not live within an hour's drive from Jacksonville.) This dedication to the event demonstrated by our general members illustrated to our Board that our approach is valid and supported by our members.

² The Annual Meeting presents BHAC members an opportunity to participate in the alumni chapter's operations and election of members to the BHAC's Board of Directors.

Despite the lack of a student chapter, Homecoming 2007 was also well attended. As in years past, several events were organized for our alumni. An “early bird” dinner was organized by Board member **Chuck Cutajar** on Thursday. Friday events included an organized gathering to watch the Homecoming parade and a group banquet at the Silver Slipper restaurant. Various presentations were made at the banquet, including awarding framed Golden Legion certificates for those candidates in attendance. On Saturday, the Housing Corporation held its Annual Meeting and BHAC Director **Jeff Niedenthal** gave a presentation about the BHAC’s activities for the coming year. The BHAC promoted each of these events in advance and attendance was as strong as past years.

In addition to these two annual events, the BHAC has provided its alumni a robust schedule of events. Over the past year, the BHAC has organized and sponsored events in Jacksonville, Orlando, and Atlanta (above and apart from the already mentioned events in Tallahassee and Jacksonville). These events included a golf tournament in Atlanta, a game watching party in Atlanta, a cocktail reception at an alumnus’ house in Orlando (with over 30 guests), and a reception the night before the FSU-Alabama game in Jacksonville for over 30 alumni and guests.

These events were organized through our local committee structure, a unique approach the BHAC employs to organize a multitude of events in various locations. We currently have local committees in Atlanta, Tampa, Orlando, and Jacksonville.³ Each committee is comprised of 4-6 alumni volunteers who do not serve on the BHAC Board. Unlike other alumni groups who rely on a lone volunteer, the BHAC committed itself to having each committee staffed with 3-5 alumni to share the responsibilities. This decision was based on wanting to add more engagement opportunities for our alumni while avoiding the burnout factor that a “one man show” often suffers. Of particular note, our committee chairmen represent a diverse spectrum. Two chairmen were initiated in the 1960s and two in the 1990s. Our committees are also diverse in that each committee has members from different decades. We believe this diversity serves as important purpose in that alumni may be more willing to attend events if they believe their peer group/era will attend. Using this approach, the BHAC has organized **16 events** since its founding in January 2005. It is our belief that having BHAC events organized by alumni, for alumni, ensures a sense of quality and decorum at our events, which we believe is evidenced by our high turnout and repeat attendees. We are also excited about this approach because it allows more alumni to be involved with planning positive, tangible fraternal experiences in their area, while creating a pool of talented volunteers the BHAC and National Fraternity can tap for future leadership and volunteer opportunities.

The last event component for this past year concerned planning a quality event for our alumni to celebrate three incredible developments for the Beta Eta family. At Supreme Chapter this July, Brothers **Jeff Wahlen** and **John Pierce** will assume the positions of Pi

³ Each local committee is currently planning an event for this fall.

Kappa Phi National President and Chairman of the Push America Board, respectively. Brother Wahlen, an Alpha Epsilon initiate, transferred to FSU soon after his initiation and was the key player in solidifying a Beta Chapter that had been struggling. He helped build Beta Eta into a strong chapter and then later served as Chapter Advisor while also helping with the Chapter House expansion in the late 1980s. Brother Pierce was also a strong leader for our chapter in the mid-1980s and later served on Push America's staff. Lastly, the BH Student Chapter will be reconstituted this fall through a staff-led expansion. Each of these deserves a celebration on its own merits, so the BHAC leadership decided to host an event at Supreme Chapter. Working with former Director **Eric Wahlen** and BHAC member **Paul Aase**, the BHAC has organized and will co-sponsor a reception in honor of Jeff and John's accomplishments prior to the Supreme Banquet. In tandem with this event, the BHAC has been repeatedly encouraging Beta Eta alumni to have a strong showing at Supreme Chapter. As of this letter's date, there are currently **10 alumni** registered for the event and we expect to have the largest delegation at Supreme Chapter.

3. Involvement with the Student Chapter

The closure of the Beta Eta Student Chapter in March 2006 prevented the BHAC from meeting one of its three core goals. To fill this void, the BHAC leadership resolved to engage in a proactive campaign to assist the national staff with the expansion effort at an unprecedented level. We determined early on that the BHAC could assist with both the actual expansion effort and building excitement for the new group to foster strong alumni support for the colony. Moreover, the BHAC leadership also decided that, as in other areas, we could serve as a model expansion for the greater fraternity that would hopefully assist future expansion efforts at other campuses.

This assistance materialized into a plan with three central components: education, financial and logistical support, and encouraging alumni involvement.

Education

As a preliminary note, it is important to understand the context of how the student chapter's closure resonated with our alumni. While many supported the closure, the closure was still a blow to morale. Further, the staff-led expansion process was an unknown for our alumni since the chapter had never been closed. Considering the strained relationship many of our more senior alumni feel towards the national organization for issues surrounding the loss of the chapter house in the late 1960s, we decided to leverage the expansion into an opportunity to foster a stronger relationship between Beta Eta and the National Fraternity. Part of this effort was focused on education since people generally distrust unfamiliar things. We began as soon as the student chapter was closed by hosting open telephone conferences for our alumni to discuss the closure and the plans for the future group. Beta Eta alumnus **Tom Atwood** and I participated in two open telephone conference calls with alumni from the 1950s and 1960s, which provided our alumni an opportunity to ask questions and be heard. Beyond these two conference calls, Tom and I communicated with numerous other

alumni by phone and e-mail. Moreover, at each event (including our local committee events), a presentation or report about the expansion was provided to the attendees. The feedback we received from these calls, e-mails, and presentations was very positive and, we believe, assuaged many fears regarding National Fraternity's plans for Beta Eta's future.

As discussed in Point 1 above, we chose to use our newsletter, the *Beta Eta Data*, as an educational platform. Dedicating the space normally reserved for the student chapter report, we included an article in each issue concerning the upcoming expansion. By breaking the entire expansion and chartering process into digestible and regular feature stories, we were able to educate our alumni how the expansion will be conducted and what roles alumni can play (as discussed below) with that process and directly with the new student group.

Financial and Logistical Support

With our leadership's understanding of the financial constraints under which the expansion staff works, the BHAC committed itself to assist in as many ways as possible. These efforts include:

- Utilizing our alumni funded student scholarship, the Jim Nettles Memorial Scholarship, as an expansion rush scholarship. We worked with the FSU Registrar to have the scholarship application sent to every transfer and freshman student enrolling at FSU in Fall 2008. This \$1,000 scholarship will hopefully yield applications from many outstanding potential members.
- Knowing that the largest expenditure during an expansion is staff housing, we have been able to secure a private house adjacent to the campus for the staff to use exclusively throughout the expansion.
- We arranged for the past student chapter website (*www.fsupikapps.com*), whose domain is owned by an alumnus, to be used exclusively for the expansion. We are currently working with the expansion staff to develop content to host on the site so that they can have a local, customized promotional piece on the web.
- We have and will continue to solicit our alumni for recruitment leads using the *Beta Eta Data* and *BetaEta.com*.
- The BHAC will be financially sponsoring an event during the expansion where the recruits will have an opportunity to meet with our alumni to further recruit these candidates.
- We are planning to obtain financial sponsorship for an off-campus weekend retreat for the colony at the end of the expansion.

Above and beyond these efforts, the BHAC is still looking into other potential ways our alumni can contribute in creative financial ways to swell the expansion budget so that the staff can saturate the campus with publicity and secure a sizeable, high quality group.

Alumni Involvement

The involvement and support of our alumni is crucial to the long-term health of the new student chapter. In the short term, alumni involvement can also assist recruiting and advising the new colony. As previously mentioned, the BHAC will be sponsoring an event in conjunction with the expansion staff during the expansion where our alumni strength can be demonstrated to the new recruits so that they will understand that they will be joining a large, successful and supportive family.

We are also on track to accomplish another unique Beta Eta touch to the chartering weekend. Led by Director **Jeff Niedenthal**, we will be recruiting and training an alumni ritual team to assist during the chartering weekend. Brother Niedenthal has been collecting names of interested individuals and they will begin preparations during the upcoming academic year.

Lastly, with respect to advising the colony, we have been working actively with the national staff to identify and recruit alumni to serve on the Board of Alumni Advisors (BOAA). Our goal is to have a complete BOAA selected prior to the expansion and complete training for the BOAA during the fall semester.

4. Additional Items

The BHAC has accomplished other achievements in the past year that should be considered.

Membership Drive

As of this letter's date, **185 alumni** have joined the BHAC by paying a \$25 membership fee. This membership number equates to a membership rate of **16% of all living Beta Eta alumni**. The BHAC views membership growth as a measure of success because the Board believes chapter alumni will financially support things in which they find value. This belief was further strengthened by the rapid growth of our organization. We had 91 members at the close of our first fiscal year, 164 at the close of our last fiscal year, and currently have 185 members (our fiscal year ends June 30). Our current membership represents a **13% increase** in membership this year. We recognize our new members on our website by periodically posting an updated membership roster and a complete member roster is included with our Annual Report in the summer edition of the *Beta Eta Data*.

Chapter History Project

Beta Eta was founded in 1950. Realizing that the chapter has done a relatively poor job capturing Beta Eta's history over the decades, the BHAC initiated an effort to document

the history of Beta Eta. We formed a Chapter History Committee, led by Director **Roger Randolph**, to create a written record of Beta Eta's rich history. The committee was directed to collect and organize the history of Beta Eta by decade, including pictures, anecdotes, confessions, etc. Response has been very positive. Several alumni have also stepped forward to serve on the committee while others have already provided their personal collections of pictures. At present, we are well under way in creating the written product for the 1950s and 1960s. We also intend for this document to serve as a teaching device for the historical component of the member education program for the future undergraduate chapter.

Above and beyond these efforts, the BHAC has been attempting to reclaim much of its memorabilia (composites, trophies, pictures, etc.) lost during the last years of the student chapter's existence. We learned that some of these items were taken by other Greek organizations as pranks. To recover these items, the BHAC has been sponsoring a bounty for reclaimed memorabilia. Each year, we send the other Greek organizations a memo requesting that they search their premises for such items in exchange for a financial reward. This constant effort has yielded some positive results, including the recapture of some composites and the chapter bell.

Strategic Plan

At the February 2007 Annual Meeting, the BHAC adopted a strategic plan (a copy of the presentation and written plan are included). The plan was created in response to the student chapter's closing and changing conditions on the FSU campus. We determined that the chapter's closing provided an opportunity to improve and advance the Greater beta Eta organization to ensure stability in the future. The plan also created a mechanism to avoid having issues languish until the chapter is reconstituted, which could impose an inordinate toll on the chapter's alumni volunteers. We identified housing, alumni development, historic preservation, and re-colonization of the student chapter as the key areas to address. As this letter illustrates, the BHAC has made tremendous progress on many of these areas, particularly alumni development, re-colonization, and historic preservation. Moreover, the BHAC leadership has been working closely with the Housing Corporation Board to advance the housing goals outlined in the plan.

Alumni Recognition

Recognizing that the strength of our membership derives from alumni involvement, the BHAC formally recognizes those members who were inducted into Pi Kappa Phi's Gold and Silver Legions. We use our events to create public platforms where such longevity is recognized. The BHAC also issues Resolutions of Appreciation for each of our alumni who attain these milestones.

Greater Fraternity Relations

Understanding that what we have learned through this process may be beneficial to other like-minded groups, the BHAC has continued to provide advice to alumni from other

chapters regarding our development and organization. We realize that the success we have enjoyed during our first three years can be of benefit to many Pi Kappa Phi alumni, and we are dedicated to assisting anyone interested in forming an alumni chapter.

Moreover, BHAC members are routinely involved with other chapters in an advisory role. After serving as Housing Corporation President for Beta Theta Chapter, **Chris Downs** assumed the role of Chapter Advisor earlier this year. Brothers **Scott Middlebrooks** and **Chris Ricci** serve on the BOAA for Eta Delta Chapter and Brother **Jonathan Stevens** has advised the Theta Zeta and Theta Eta Chapters on recruitment and financial issues.

In closing, as President and Chairman of the BHAC, I feel a great sense of pride and gratitude for those alumni who I have worked with over this past year. Based on my personal observations, the many alumni who have contributed to the success of the extended Beta Eta family are a testament to Beta Eta Chapter's great legacy that we all will work to regain in the coming years. I respectfully urge the National Fraternity to recognize the hard work, dedication, and selfless devotion of time and money by the many individuals who have contributed to the overall success of the Beta Eta Alumni Chapter, Inc. by bestowing the BHAC with Pi Kappa Phi's Alumni Chapter of the Year Award for 2008. The Fraternity's recognition would constitute a validation for both what we have accomplished and the direction in which we are headed. If you require any additional information, please feel free to contact me at (703) 346-0336 or mloy@intermarkets.net.

In Pi Kappa Phi,



Michael S. Loy
President & Chairman

cc: Jeff Wahlen, Pi Kappa Phi National President-elect
John Pierce, Push America Chairman-elect
Tom Atwood, Pi Kappa Phi Foundation
Christian Wiggins, Assistant Executive Director
Steve Evans, Director of Alumni & Volunteer Services
Brian Baber, BHAC Vice President
Lee Nichols, BHAC Treasurer
Jeff Niedenthal, BHAC Secretary
Roger Randolph, BHAC Director
Frank Kaney, BHAC Director
Chuck Cutajar, BHAC Director
Chris Mueller, BHHC President