

Alpha Sigma Delta of Chi Psi, Inc.
2004 Annual Report

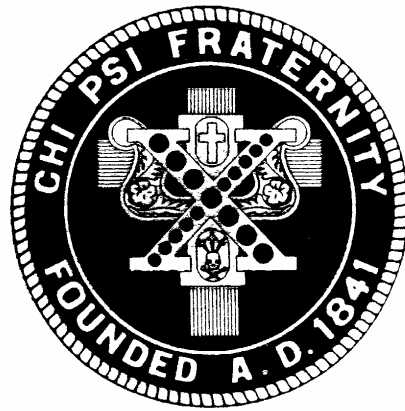


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Greetings from the President

Dear Brother,

I am pleased to introduce the second Annual Report of Alpha Sigma Delta of Chi Psi, Inc. As we continue to expand and develop the mission of the corporation, I feel that it is extremely important to let the Alpha's alumni community know about the great work that is taking place. Over the last year and a half, we increased the frequency of *The Lodge Letter's* publication, established www.lodgealums.org, and held our first major alumni social gathering outside of Durham. During this same period, we helped the undergraduates of Alpha Sigma Delta by expanding our scholarship program, hosting a recruitment workshop, and assisting them with insurance. This is an exciting time to be a member of the corporation.

In spite of this progress, we have not lost sight of the future. As you will see within the pages of this report, the corporation is setting the stage for a host of new programs that will benefit all members of Alpha Sigma Delta. This work includes increasing the number of alumni events outside of Durham, establishing a career development committee, and creating an educational foundation. Whether you live in the Research Triangle and visit campus every Friday for Dr. Dale Lunch or live on the west coast and only visit the Duke Chapel in your memory, the corporation wants to help you keep in touch with your Brothers in Chi Psi.

I hope you will be pleased with the programs that are laid out within this report, and I hope we can count on your support in making them succeed. Whether you volunteer to assist as a career development mentor or donate to the Annual Dues Campaign, everyone can help the corporation improve the services and support that it provides to the alumni and undergraduates of Alpha Sigma Delta.

Yours in the Bonds,

A handwritten signature in black ink, appearing to read "Brett B. Pettigrew", followed by the Greek letters "ΣΔ '01".

Brett B. Pettigrew, ΣΔ '01
President
Alpha Sigma Delta of Chi Psi, Inc.

A Word from Dr. Dale

Gentlemen:

Having been asked if I'd be willing to write a few words of greeting to the Sigma Deltans of yesteryear, and having actually seated myself at the console of the Micron (my fingers wandering idly over the keys), I realize anew that when it comes to letters I am mainly into retail, not wholesale.

Nevertheless, marching boldly into the electronic mist, I am glad to send warm greetings to you . . . and you . . . and you. And the next thing that comes to mind is to say (I'm beginning to sound like my father) "Why don't you write?" For shame, Alex. (After all, I shared my used Kleenex with you.) It was great, Br'er Arbuckle, to see you onstage in *Copenhagen* when your company came to Raleigh, but what are you doing now? Speaking of Seans, how'r the kids, Br. Breit? (I'm just kidding. You get an A in Advanced Communicating II.) And, of course, already I'm back in retail. Without shaking a finger at Tom Hope or Brendan or Michael or James or Steve. Or Pamir, whom I almost wrote a while back, sharing his anguish in far-off Paris or London.

Then again (let's face it), I couldn't keep up with the correspondence if, in real life, all of you really did keep in touch with me. Still, I can hope that you are keeping in touch with one another, because there's something very nice, very reassuring, about sharing and building one's days and ways on the good old days. And, speaking as someone who will soon be a hundred and two, I've become fully aware of how fast the living present becomes the old days—good, bad, and indifferent as they are.

If I had to filter out any residual theme buried in these words of greeting, I guess it would have to do with my hope that you gentlemen out there somewhere are not just doing well but also enjoying and leading lives that are a little fuller and richer because you are keeping in touch with one another.

Kind greetings to all and,
Yours in the Bonds,

Dr. Dale

State of the Corporation

Alpha Sigma Delta of Chi Psi, Inc. continued to improve the services provided to alumni and undergraduates during 2004. Significant internal improvements also took place during this time in order to support the continued expansion of these external services. Some of the highlights from this year are:

Social Activities

- Corporation-sponsored events continued to be a mainstay during Duke's alumni weekends. Homecoming saw the corporation organize an open bar for alumni at *Satisfactions*, trips to local restaurants for brunch and dinner, and a golf outing on Sunday afternoon. The annual Founders' Day Banquet was also scheduled to coincide with Duke's Reunion Weekend to allow alumni to more easily attend, and the weekend was rounded out by a Sigma Delta golf outing.
- The corporation also took steps to expand social activities away from campus by establishing an annual summer alumni gathering. This event will be scheduled each summer in an area outside of Durham and consist of activities for alumni and their families. The corporation's summer board meeting will also take place during this weekend. The first annual summer alumni gathering took place in July of 2004 in Washington, DC and featured a dinner outing in Georgetown and a tubing trip on the Shenandoah River.

Communications

- The corporation continued to expand programs that foster communication among alumni and undergraduates. The electronic distribution of *The Lodge Letter* has allowed the corporation to reach a wider audience with timelier news and expanded content. The corporation also took steps toward a permanent presence on the internet by securing the rights to www.lodgealums.org.

Alpha Support

- Ties between the corporation and the undergraduate Alpha were significantly strengthened in 2004. Representatives from the alumni corporation met with the university's Director of Residence Life and Housing Services to discuss Chi Psi's presence on campus and the role that the Alpha's alumni could play in its efforts to establish housing.
- In an effort to bolster the Alpha's recruitment efforts, the corporation also organized a recruitment workshop in Richmond, Virginia that allowed the undergraduate leadership, former recruitment chairs from the Alpha, representatives of the alumni corporation, and a moderator from the Chi Psi Central Office to discuss effective recruitment techniques.

Corporation Operations

- Although many of the corporation's internal operations were enhanced during 2004, the most obvious improvement came through an overhaul of the corporation's fundraising efforts. The publication of an annual report gave alumni a complete picture of corporation's services for the first time, and the expansion of payment options to include online donations through PayPal made it easier for alumni to donate. The results of these improvements were immediately obvious, as donations rose significantly during 2004. This additional funding put the corporation in a strong position to move forward with its plans to expand services for alumni and undergraduates over the next few years.

The Year Ahead

Changes in the Undergraduate Experience

Though many aspects of fraternity life remain the same for Alpha Sigma Delta's undergraduates, recent changes at the local and national levels have presented the group with new challenges.

- Duke's campus has seen significant physical and cultural changes over the past five years. These changes include the construction of new residential facilities; the expulsion of several reprehensible fraternity chapters from campus; a reorganization of the undergraduate residential system followed by a freeze on the new system while even more sweeping changes are considered; and most recently, the inauguration of a new university president. These changes have left administrators and students struggling to identify how Greek groups fit into the "quad model" and the soon-to-be-revamped Central Campus.
- Alpha Sigma Delta joined Duke's Interfraternity Council (IFC) in 2002. This move has brought the group new opportunities (e.g., a voice in the Greek community) and new challenges (e.g., less control over recruitment and pledge education). Despite several years of effort, the group is still working to find its place within this system.
- Several highly publicized, alcohol-related deaths (including that of a Chi Psi pledge at the University of Colorado) have brought heightened scrutiny on the activities of fraternity chapters across the country.
- The rising cost of insurance and national fraternity membership fees have raised Alpha Sigma Delta's dues to an all-time high – over \$400 per brother, per semester. This has increased the difficulty of recruiting new members and retaining existing members.

These issues are magnified by the fact that Sigma Delta's membership is constantly turned over through the annual cycle of recruitment and graduation. The corporation's stability is crucial to the Alpha's efforts to succeed in this challenging and dynamic environment.

The Year Ahead (continued)

Alumni Support for Undergraduate Brothers

As the primary support organization for Alpha Sigma Delta, the alumni corporation is committed to helping the Alpha prosper. Over the next year, the corporation will work to ensure that the Alpha continues to provide an exciting and enriching environment for its members. This support will take many forms:

- The corporation will increase its support of the Alpha's efforts to build a successful recruitment program in the midst of a fluctuating campus identity, rising financial burdens, and the framework of the IFC. To this end, the corporation will organize additional recruitment workshops, provide guidance, and assist financially, when appropriate and necessary.
- In addition to its continued funding of the Randall and Ritchie scholarships for academics and leadership, respectively, the corporation recently announced a new scholarship to recognize an outstanding participant in each pledge class. This award will recognize dedication and provide each prospective member with an opportunity to reduce the financial cost of membership.
- The corporation will continue to work with the Alpha leadership on a regular basis through scheduled quarterly board meetings (three of which are held on campus), monthly teleconferences, and biweekly standing calls between the #1 and the Corporation president. This regular communication will provide the Alpha with additional stability and a "historical" perspective – both of which are invaluable for a group that has 100% turnover in its membership every four years.
- The corporation will expand its financial oversight of the Alpha to ensure that undergraduate dues and donations from the alumni corporation are handled properly. To this end, the corporation treasurer will continue to work with the #4 to develop a realistic and fiscally sound budget for the academic year. Additionally, the corporation will continue its stewardship of the Alpha's savings account and perform a semesterly audit of the Alpha's finances.
- The corporation will continue to play an active role in the Alpha's relationship with Duke University. Although the administration considers the Alpha a "model" for other fraternity chapters on campus, it is important to ensure that they are aware of the support of the Alpha's alumni community. As the university's residential life system continues to undergo substantial changes, the corporation will work with the Alpha and with university officials to ensure that Chi Psi is properly represented on campus.
- The corporation will assist the Alpha in dealing with the increased scrutiny of its social and initiation activities. In addition to providing risk management guidance to the Alpha, the corporation's leadership is also working with the undergraduates to increase communication about the nature of events that the Alpha is hosting. This increased communication will provide the Alpha with greater assurance that the appropriate risk management policies are being followed.
- The corporation's career development committee, organized in 2004, will begin to provide undergraduates with career development support. Alumni members of this program will assist members of the Alpha in searching for a job, preparing a resume, and networking as they prepare for a post-undergraduate career.

The Year Ahead (continued)

Serving Alpha Sigma Delta's Alumni

In addition to providing support and guidance to Alpha Sigma Delta's undergraduates, the corporation's primary purpose is to foster alumni interaction. During 2004, the corporation took significant steps to expand the services provided to alumni. This work will continue throughout 2005. Some highlights include:

- The corporation will continue to foster interaction among alumni by organizing another alumni weekend during the summer of 2005. Like the events held in Washington DC during July of 2004, the second annual Alpha Sigma Delta "Summer Alumni Gathering" will provide a series of events for alumni and their families. By holding this weekend away from Duke's campus, the corporation hopes to draw in alumni that may not be able to make it to Durham on a regular basis.
- Homecoming and Reunion Weekend events will continue to be expanded. Alumni will be surveyed during the summer of 2005 to help the corporation provide on-campus events during these two weekends that are of interest to alumni and their families.
- The corporation will continue to publish *The Lodge Letter* as a monthly email newsletter in conjunction with the Alpha. Distributed to alumni, undergraduates, family members, faculty, and members of the national fraternity, this newsletter serves as the primary vehicle for publicizing alumni and undergraduate news and updates.
- Building on the success of the electronic distribution of *The Lodge Letter*, the corporation will unveil the www.lodgealums.org website in early 2005. This alumni-focused website will provide space for archived issues of *The Lodge Letter*, online access to alumni information, and a central clearinghouse for the activities of the corporation. The development of content for this website will be driven by the results of the survey distributed to all alumni in March 2005.
- The corporation will continue to lay the groundwork for the creation of a 501(c)(3) educational foundation within the next few years. Once established, this foundation will allow alumni and friends of the Alpha to make tax-deductible contributions that will fund educational programs and scholarships that benefit both alumni and undergraduates. The continued expansion of the corporation's fundraising efforts will be crucial to securing the funds needed to establish this educational foundation.
- Sigma Delta has applied to host the 2009 National Convention, in celebration of its 20th year in the bonds of Chi Psi. In preparation for this major undertaking, members of the corporation's board are participating in the 2005 convention planning committee for Alpha Sigma. The corporation looks forward to hosting both the National Convention and many Sigma Delta alumni and their families in the summer of 2009.

The Year Ahead (continued)

The Corporation's Vision for the Future

Although much of the corporation's current work is focused on solidifying the core services that undergraduates and alumni need, it is also laying the foundation for a new and exciting era. The expansion of the corporation's fundraising efforts, for example, will soon make it possible to create an Alpha Sigma Delta educational foundation. The establishment of such a foundation will increase the number of scholarships and awards available to undergraduates and alumni and will allow for tax-deductible donations to Alpha Sigma Delta. The creation of such a group would not have been possible several years ago, but the ongoing expansion of Sigma Delta's alumni population has now placed it within reach.

The needs for undergraduate support are also growing, as Duke University begins to redefine the way it looks at residential life. At a recent alumni gathering in Washington, DC, President Broadhead discussed plans for a new Central Campus that would include a mix of apartments, restaurants, and other types of dwellings aimed at providing upperclassmen with a more "adult" experience. Others have suggested the establishment of some sort of "fraternity row" along Campus Drive. Regardless of the direction that the administration chooses to take with this residential transformation, the corporation is committed to building solid relationships with the university's administrators so that alumni can be a positive and active force in the Alpha's ongoing efforts to secure a physical space on campus.

Lastly, as Chi Psi is a "social fraternity," the board of Alpha Sigma Delta of Chi Psi, Inc. envisions a significant increase in the number of events that are organized for the ever-growing alumni population of Alpha Sigma Delta. With major concentrations of alumni scattered up and down the eastern seaboard and in California, we are drawing closer to a time when alumni and their families can look forward to regular, local events to catch up with other alumni to celebrate Duke and their brotherhood in Chi Psi.

Your support – through the Alumni Dues Campaign, mailing lists, alumni gatherings, and assistance to the Alpha – is essential to helping us realize this vision. We invite you to join us in continuing the proud tradition of Alpha Sigma Delta through your support of Alpha Sigma Delta of Chi Psi, Inc.

Financial Summary

In 2004, the board of Alpha Sigma Delta of Chi Psi, Inc. took several key steps towards securing the corporation's financial future and building a foundation on which we hope to accomplish several ambitious objectives during the next few years. Efforts to improve the corporation's financial operations focused on increasing revenue and reducing unnecessary costs.

- Thanks to the generous donations of fifty-one alumni, the corporation increased its collected dues by 88 percent over the previous year. This level of donations increased the organization's cash reserves by nearly \$1500 in 2004. This is a necessary first step in putting the corporation in a position to accomplish one of its chief objectives: the establishment of an educational foundation.
- The corporation's board also took steps to eliminate costs that were not directly benefiting Sigma Delta's alumni and undergraduates. Most notably, we eliminated the substantial expense of producing the paper-based Lodge Letter – which typically represented 25-40 percent of the group's operating costs – by converting it to electronic delivery. Other measures included the reduction of the corporation's mailbox rental fee by 75 percent.
- The corporation made several operational changes during 2004 related to its finances. Specifically, we officially shifted the fiscal year from the Duke University academic year to the calendar year. We also established an interest-bearing savings account to hold excess cash reserves for future expenses, such as the founding of the educational foundation.
- This marked the first year in which the corporation paid its share of the Alpha's insurance bill. This step was taken after the corporation board became aware of the fact that the insurance policy historically paid for by the undergraduates also covers all corporation-sponsored functions. Alpha Sigma Delta of Chi Psi, Inc. is one of the first Chi Psi alumni corporations to accept this responsibility.

Financial Summary (continued)

Alpha Sigma Delta of Chi Psi, Inc Consolidated Statement of Operations Annual Summary

	2004	2003
<u>Income Statement</u>		
Revenues		
Alumni Donations	\$ 3,906.20	\$ 760.00
Other	\$ 0.65	\$ -
Total Revenues	\$ 3,906.85	\$ 760.00
Operating Expenses		
Homecoming	\$ 469.25	\$ 479.29
Lodge Letter	\$ -	\$ 279.75
Convention Fee	\$ 200.00	\$ 100.00
Scholarships (Randall & Ritchie)	\$ 500.00	\$ 420.00
Insurance	\$ 600.00	\$ -
Mailbox Rental	\$ 48.00	\$ -
Mailings, Postage and Supplies	\$ 238.56	\$ -
Alpha Recruitment Support	\$ 190.00	\$ -
Other	\$ 212.75	\$ -
Total Operating Expenses	\$ 2,458.56	\$ 1,279.04
Net Balance	\$ 1,448.29	\$ (519.04)

Financial Summary (continued)

Alpha Sigma Delta of Chi Psi, Inc
Consolidated Cash Flow
Annual Summary

	2004
<u>Cash Flow from Operating Activities</u>	
Beginning Cash Balance	\$2,084.26
Cash Inflows	
Alumni Donations	\$3,906.20
Other	\$0.65
Total Cash Inflows	\$3,906.85
 Available Cash Balance	 \$5,991.11
 Cash Outflows	
Homecoming	\$469.25
Convention Fee	\$200.00
Scholarships (Randall & Ritchie)	\$500.00
Insurance	\$600.00
Mailings, Postage and Supplies	\$238.56
Mailbox Rental	\$48.00
Alpha Recruitment Support	\$190.00
Other	\$212.75
Total Operating Expenses	\$2,458.56
 Ending Cash Balance	 \$3,532.55

2004 Annual Dues Campaign

Purple & Gold Club (\$250 and up)

Lazarus, Jim '01
Ritchie, Steve '90
Sullivan, Mike '90

Ritchie Club (\$100 - \$249)

Brandaleone, Chris '03
Brown, Josh '96
Coppola, Steven '92
Farrell, Wilson '91
Felts, Anthony '91
Griesser, Bill '92
Hess, Jon '00
Jordan, Dave '98
Katz, Adam '96
Lenox, Chris '99
Long, Brent '91
Messner, Jeff '00
Pettigrew, Brett '01
Randall, Dale '51
Superina, Nick '03
Morse, Jason '97

Randall Club (\$50 -99)

Boycan, Steve '90
Buchsbaum, David '94
Djuranovic, Marko '02
Eisenhardt, Jesse '01
Fromal, DJ '95
Hardy, Douglas '91
Hasbrouck, Greg '01
Hurley, Daniel '97
Lamberg, Lauris '95
Lawson, Allan '91
Lisook, Adam '99
Mecca, Vito '04
Owens, Robert '90
Palis, Ross '98
Shelley, J. Andrew '90
Walsh, Brian '93
Witzel, Dave '92
Womer, Jonathan '94

Dues Contributors (\$49 and below)

Altman, Brian '99
Baltz, Joe '03
Breit, Sean '98
Burlin, Jeff '05
Dzurko, Bill '00
Gelenbe, S. Erol '95
Hamburg, Jeffrey '92
Harrison, Benjamin '93
Jones, Andrew '90
Karam, Jason '00
Kelley, Sean '95
Knowles, Justin '97
Milford, Timothy '92
Mordes, Dan '03
Morse, Jason '97

2004 Annual Dues Campaign (continued)

Top Classes by Amount Given

1. Class of 1990
2. Class of 2001
3. Class of 1991
4. Class of 1992
Class of 2000
6. Class of 2003
7. Class of 1996
8. Class of 1998
Class of 1999
10. Class of 1995

Top Classes by Number of Givers

1. Class of 1990
2. Class of 1991
Class of 1992
4. Class of 1995
Class of 2000
Class of 2001
Class of 2003
8. Class of 1997
Class of 1998
Class of 1999

The Alpha Year in Review

Social Activities

- As is traditional, the Brothers kicked off the summer with our annual trip down to the Red Tree Inn at Myrtle Beach for Duke's Beach Week.
- Those Brothers who remained at/around Duke for the summer met at least once a week to have dinner and hang out.
- Brothers held a weekly Monday Night Football and poker night on central campus.
- Keeping with tradition, Dr. Dale lunches were held every Friday.
- Brothers organized and attended weekly brother dinners.
- The Brotherhood hosted several cookouts at our apartment block on Chi Psentral.
- The Alpha rented out The Ice House in Cary for a fun filled night of "Broomball" for Brothers and recruits.
- Our annual fall semi-formal was held at the local restaurant Pop's.
- The Brotherhood hosted a very well attended Wine and Cheese during Parent's Weekend.
- The annual spring semi-formal, one of the best in recent memory, was held at Tosca's.
- The Brothers hosted a Superbowl party at the block on Chi Psentral.

Fraternal Activities

- Brothers ventured over to the lodge at Alpha Pi Delta at NC State to meet and hang out with the Brothers there.
- The Alpha participated in the Homecoming bench-building contest, and our bench remained proudly on display on Main West campus behind Few Quad, until it met an even prouder fiery fate at the hands of the UNC victory bonfire.
- Alpha Sigma Delta participated for the second time in Duke's IFC Greek Week activities.
- Brothers traveled to the NC Museum of Art in Raleigh to take a group tour of the Matisse/Picasso Exhibit.
- The Alpha invited representatives from Men Acting for Change (MAC) to come in and speak to the Brotherhood about sexual assault on campus.
- The Alpha hosted the first annual Jolly Roger Jam at George's Garage.
- The Alpha will host its Founder's Day Banquet on April 16, 2005 at the Durham Hilton.
- The Alpha threw a very successful Graffiti Party for the second straight year.
- Several groups of Brothers traveled together to different exotic locales for Spring Break '05.

The Alpha Year in Review (continued)

Recruitment

- The Alpha sponsored the first annual Chi Psi “Donut Lodge”, where we distributed free donuts, orange juice, tea, and hot chocolate to students at the West campus bus stop during the first semester reading period as a lead-in to formal recruitment.
- The Alpha participated in the IFC rush process, hosting events such as pool at a local pool hall, paintball, basketball, bowling, a Halo II tournament, and poker nights. In the end, we were rewarded with eight outstanding gentlemen who accepted their bids.

Philanthropy

- The Brotherhood took first and second place in “Chi-O Bowling”, a charity event sponsored by Chi Omega sorority.
- The Alpha participated in the “Into the City” community service campaign.
- The Alpha competed against other campus fraternities in AOPi sorority’s “Back to the Beach” charity competition.
- Brother Zach Goode came in second place at Alpha Phi’s “King of Hearts” charity event.
- For a third straight year, the Brotherhood formed a team to participate in the Duke Relay for Life event to benefit the American Cancer Society.

Athletics

The Alpha competed in the following intramural leagues:

- Football
- Soccer
- Dodgeball

Alpha Operations

- The Alpha had another successful season of selling our signature “Go to Hell Carolina” t-shirts.
- Officer elections were held, with Brother Jacob Cook being elected at the new #1, Brother Mark Dunlap as the new #2, and Brother Richard Bailey was re-elected as #3.
- The Brotherhood hosted Brother Phil Gillingham from Alpha Theta Delta to facilitate our Spring Alpha Management Retreat (AMR).

Alpha Sigma Delta of Chi Psi, Inc.

Board of Directors

President

Brett Pettigrew, '01
brett.pettigrew@alumni.duke.edu

Vice-President

Jim Lazarus, '01
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Secretary

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Treasurer

Jon Hess, '00
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Immediate-Past #1

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Current #1

Jake Cook, '06
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Faculty Advisor

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Director of Alumni Communications

Nick Superina, '03
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Director of Career Advising

Jeff Messner, '00
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