

Treuman State
UNIVERSITY

2016-2017

PHI BETA LAMBDA

Local Chapter Annual
BUSINESS REPORT



Kirksville
MISSOURI

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STATE OF THE CHAPTER

April 25, 2017

Dear Phi Beta Lambda Members:

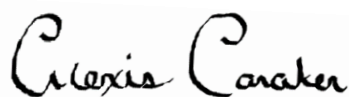
Congratulations to everyone for a successful school year and our progress as a chapter. In a town such as Kirksville with a population last measured as 17,577 people, it seems as if there is a large difficulty finding worthwhile extracurricular activities. But the 6,039 students here at Truman State University have found their homes amongst the more than 240 organizations offered. We are both honored and proud of the members who have chosen to take a place in this organization.

As a chapter, we have seen members graduate and start their futures in the professional world, we have struggled with the associated drop in membership, and we have stood our ground as a prospering organization. We stand at 16 members after bidding adieu to our 5 graduates and accepting our 5 entering pledges with open arms. We have two wonderful advisors who, despite only having been with us a year, diligently attend every meeting and keep up to date with our events. As a chapter, we are moving forward to increase our awareness around campus. As an executive team, your elected officers are working hard on changes to both the pledging and recruitment process as well as to introduce and to conduct events in your best interest.

Through various workshops and the knowledge gleaned from professional speakers, we have grown our skills and assets in the workforce. At Missouri's State Leadership Conference, we have the opportunity to showcase these skills in combination with our formal education in a professional and competitive environment. After competing, we will each have the great opportunity to network and to build our connections. As we have done in the past, we are hopeful to send members to the next level of competition at Nationals.

We have the ability to provide our members with these opportunities due to the hard work our members have put forth during fundraising events and the efforts of our VP of Fundraising. Our culminations also would never have progressed without the spirit of our wonderful advisors and our dedicated members. Thank you to each one of you for your effort on the behalf of PBL. We will continue to stand strong and blossom into our potential.

Most sincerely,

A handwritten signature in black ink that reads "Alexis Caraker". The signature is written in a cursive style with a large, prominent initial 'A'.

Eta Alpha Theta Chapter President of Phi Beta Lambda

ACTIVITIES TO BENEFIT CHAPTER AND ITS MEMBERS

Program of Work

April-May.

- Attend officer transition meeting
- Attend SLC in Springfield, MO
- Hold first executive meeting

May-July.

- Read officer guides
- Decide goals for each officer
- Develop budget
- Plan social, service, fundraising, and professional events
- Attend NLC in Atlanta, GA

August.

- Hold semester's first chapter meeting
- Prepared Buddy Packs
- Attend Fall Activities Fair
- Initiate recruitment

September.

- Begin Pledge meetings
- Partake in StrEat Clean-Up

October.

- Helped at the Salvation Army
- Helped at the Crossing
- Register members by the 20th
- Host a digital scavenger hunt
- Fundraise with Krispy Kreme
- Visit park for friendly football

November.

- Fundraise for the March of Dimes
- Play Dollar Bowling at Leisure World
- Make pumpkin pies for homeless
- Write letters to military personnel
- Hold nominations and elections

December.

- Go to Kirckville Cinema
- Host Winter Banquet
- Finalize events for next semester

January.

- Hold semester's first chapter meeting
- Attend Spring Activities Fair
- Initiate recruitment
- Cook at Hope's Kitchen

February.

- Begin Pledge meetings
- Register members by the 17th
- Fundraise with Shakespeare's Pizza
- Enjoy National FBLA-PBL week
- Host SLC Competition Practice
- Submit the LCABR

March.

- Review Constitution, Executive Positions, and Pledge Process
- Play Sardines in Ophelia Parish
- Host a game night

April.

- Participate in the Big Event
- Attend SLC in Springfield, MO
- Partake in StrEat Clean-Up
- Make dog toys for animal shelter
- Bowl for animal shelter donations
- Hold nominations and elections
- Email Dean about BSEC membership
- Finalize digital officer guides

May-June.

- Host a digital scavenger hunt
- Distribute graduation cords
- Host Spring Banquet
- Hold officer transition meeting
- Hold first executive meeting
- Register for Fall Activities Fair
- Oversee NLC activities in Anaheim

Recruitment Activities

Recruitment season is a welcomed and anticipated event each semester. Over the past two semesters, our chapter has enthusiastically recruited by enhancing connections around campus. Below is a list of our typical recruitment events coordinated principally by Vice President of New Membership Hien Nguyen.

Facebook event. Members invite their friends, and updates are posted there.

Publication. The Vice President of Public Relations designs the recruitment poster which includes our recruitment schedule. We printed 100 posters this fall and 75 this spring.

Speaking in classes. The opportunity to speak in classes is a great chance for PBL to reach to potential members through presentations in many business-related classes including, economics, finance, accounting, business law, and public speaking.

Activities fair. Truman PBL participates in a campus-sponsored Activity Fair held each semester as part of our promotional effort. We use the time to promote our image to the whole campus and to spread the word about our recruitment to potential members.

Information nights. Information Nights are a perfect occasion for potential members to learn what Phi Beta Lambda can offer during their time here at Truman. Membership applications are distributed and collected at each session.

Meet the chapter. Prospective members can socialize with the current members with conversations, ice breakers, and other games. Before joining the chapter, this session provides a glimpse at the close connection between members.

Meeting sit-in. Potential members attend a regular chapter meeting to get acquainted with our organizational procedures. We organize workshops and invite professional speakers every week to speak about a wide range of business-related topics.

Interviews. Potential pledges who have completed their applications are interviewed to ensure their compatibility and readiness for PBL. The interview also offers them the chance to interact more with the executive members in a more professional setting.

Invite-Only dinner. The executive members provide dinner to celebrate the successful applicants who are now members of the PBL family.

Pledge requirements. All pledges must fulfill the requirements listed below in order become active and participating members of the organization:

- Pay pledge member dues: \$55 for one semester or \$100 for one academic year.
- Attend pledge meetings. (Allowed up to 3 unexcused absences)
- Attend chapter meetings. (Allowed up to 3 unexcused absences)
- Interview all pledges, active members, and chapter advisers.
- Earn a 75% or better on all pledge quizzes. (Allowed 1 retake)
- Work with pledge class to plan, promote, and facilitate an activity for the chapter.
- Participate in at least 3 social events and meet service credit minimum each semester.
- Participate in all fundraising events during the semester.



Leadership Development

Constitution. Our constitution is the groundwork of our weekly meetings. All chapter, pledge, and executive meetings are conducted in accordance to its guidelines – as monitored by our Secretary Kelsey Beasley and later Loc Huynh.

Elections. Nominations and elections for the new officer team are conducted near the conclusion of each academic year unless an officer graduates in the fall. Active and pledge members who have fulfilled their membership requirements are eligible to vote and to run for any officer position. Each candidate prepares a two-minute speech and answers three-minutes of questions. Candidates then leave the room while the remainder of the chapter discusses their credentials. Candidates re-enter the room to cast their votes with the chapter. The current Secretary counts the votes, and the current President announces the name of the newly elected officers. No promotional items are created by the candidates at any point. This gives the candidates time to really focus on public speaking and think critically about how to improve the chapter – the foundations of leadership. After elections, old and new officers hold a transition meeting. Our training framework ensures that every member has an equal opportunity to develop personal leadership.

Officer positions. To offer the most leadership opportunities possible, the executive team is presently divided into nine positions: President, Vice President of Professional Development, Vice President of New Membership, Vice President of Fundraising, Vice President of Community Service, Vice President of Chapter Involvement, Vice President of Public Relations, Secretary, and Treasurer. Each officer maintains a digital folder in Google Drive which contains tips and resources for their respected positions. The positions are designed to promote communication between fellow executive members. Since membership went down this year, the current officers are discussing how to combine roles to be more efficient until our membership numbers regain strength.

Committees. We did not have sufficient membership to warrant them this academic year. With the proposed executive and constitutional changes for this upcoming year, we will be able to provide committee participation for each member and vice president. We are also discussing a name change to ‘mentorships’ to better articulate its developmental purpose more clearly.

BSEC. Networks are also built through the Business Student Executive Council (BSEC) sponsored by our School of Business. One or two executive members – such as President Alexis Caraker – from business organizations like Phi Beta Lambda, Alpha Kappa Psi, Delta Sigma Pi, Beta Alpha Psi, and the American Marketing Association work with the Dean Dr. Deb Kirby to promote events sponsored by the School and to evaluate its current courses and professors. Every April, BSEC selects an Outstanding Professor and pays tribute to those who are retiring at the Recognition Dinner. Our PBL members who placed at SLC for their event(s) are invited to the dinner as well. Both ensures that our quality of education stays highly ranked.



Career Exploration and Preparation

Our chapter of PBL focuses greatly on preparing our members with knowledge about how to succeed in the working world. Throughout the semester, Vice President of Professional Development Sydney Merriman has facilitated a wide variety of workshops and has provided us with various speakers to accomplish precisely that.

Workshops. In addition to the traditional résumé, cover letter, and elevator speech workshops, we also discuss graduate school preparation, proper written communication, dinner etiquette, as well as interview etiquette.

Speakers. The diversity in speakers and workshops helps to keep members interested in the many ways they can prepare themselves for the business world in addition to facilitating communication between companies and members. They come from various companies and departments within Truman to speak to our chapter about certain topics. Typically, they expand on a workshop from the previous week, and they have the option of presenting their careers, as well as opportunities within their career or company. Our speakers have represented companies such as Edward Jones, Monsanto, Deloitte, and Principal Financial Group. Our speaker from Monsanto was a Truman PBL alumnus, and we were thrilled to have him speak, as he already knew so much about the organization, because he could cater his presentation to our members even better. We also enjoy inviting local enterprises like Sweet Espressions and Take Root Café. We hope to continue to have speakers from different companies volunteer their time and effort to come present to our chapter.



Business Partnerships

Like last year, we encouraged our members to participate in Alpha Kappa Psi's Volunteer Income Tax Assistance Program (VITA) which prepares tax forms for students and community members around Kirksville. In addition to encouraging our members to interact with our guest speakers, we encourage them to be involved with events at the Career Center: graduate school information nights, résumé reviews, career expo, etc. We hope that the connections formed by our Vice President of Professional Development continue to grow into additional opportunities for our membership.

Chapter Fundraising

Krispy Kreme. During October 2016, our chapter collaborated with Krispy Kreme Doughnuts, Inc. Each member was required to sell at least 3 dozen of donuts at \$8 per dozen with \$4.50 profit margin. Members who sold three dozen were also required to help with table sale for one hour from October 3rd to 7th. We reserved plenty of time table so that we can increase sales. There were members who sold more than 3 dozen, and they did not have to sign up for the table. On October 24th, Krispy Kreme donuts were available for pickup on campus. From this fundraiser, we sold over 64 dozen of donuts and made \$270 in profit. During the spring semester, we sold local Hy-Vee doughnuts individually from which our profit was \$20.

Shakespeare's Pizza. During February 2017, our chapter fundraised with Shakespeare's Pizza Corporation. Each member sold at least two large pizzas ranging from two-cheese to panda pepper to seven other options. We spent two weeks collecting pre-sales on pizzas since Shakespeare's only accepts pre-orders two weeks advanced on the pick-up date – March 4th. Eleven members sold 29 pizzas total at \$12 each: 20 pizzas at a net cost of \$7 each and 9 pizzas at a net cost of \$6 each. Total cost was \$194, and revenue was \$348 with a total profit of \$154.

Cash flow. Our statement of cash flow is below which was compiled by Vice President of Fundraising Sunwoo Kim and Treasurer Kana Kotani and then Shuting Deng.

8/28/2016 Balance Forward		\$3,832.43
Cash Inflows		
Active Members (Yearly Dues): 8 Members x \$80	\$640.00	
Active Members (Semester Dues): 3 Members x \$45	\$135.00	
Pledge Members (Dues + Shirts): 2 Members x \$100	\$200.00	
Pledge Members (Dues + Shirts): 11 Members x \$55	\$650.00	
Krispy Kreme Fundraiser	\$270.00	
Hy-Vee donuts	\$20.00	
Shakespeare's Pizza	\$154.00	
Graduation Cords	\$30.00	
Hoodies	\$205.00	
Total Cash Inflows		\$2,304.00
Cash Outflows		
State and National Dues	(\$480.00)	
Recruitment Week	(\$195.55)	
Locker Fee	(\$5.00)	
Square Card Reader	(\$5.00)	
PBL Membership Pins	(\$16.85)	
SLC Registration	(\$585.00)	
Graduation Cords	(\$42.25)	
Hoodies	(\$240.75)	
Total Cash Outflows		(\$1,570.40)
Net Increase in Cash		\$733.60
2/24/2017 Balance Forward		\$4,556.03

Public Relation Activities and Chapter Publicity

Social events. Public relations start internally. Excited for a new school year, Vice President of Chapter Involvement Alex West and later Monica Hunter planned the social events as italicized below to both bring us together as a chapter and connect as individuals.

Meet the chapter. At the beginning of every semester, an event is held in which potential pledges can introduce themselves to the chapter and get to know us more. This semester we ordered pizza and enjoyed a get-to-know-you game. Everyone thought of clever and often tricky facts to give during the game of Two Truths and a Lie. We gained information about people's favorite colors, number of siblings, travel experiences, and preferences in pets. All around it was a wonderful way to start out the social events of the semester.

StrEat clean-up. After cleaning litter from the street that we have adopted, our members often take the time to gather together and enjoy a pleasant lunch. We set off to China Palace, a nearby restaurant that we have taken to eating at and has now become tradition. This is the first social event after pledges have officially joined and helps introduce them to the other members outside of the formal meeting setting.



Friendly Football Picnic. Members came together to enjoy the weather and some outside activity. They threw Frisbees, swung on the swings, and spun each other on the merry-go-round.

Dollar Bowling. On certain Tuesdays of each month, the local bowling alley charges only a dollar per game of bowling. This is an opportune time for everyone to get together and showcase their skills. This is especially interesting in some cases as our international students often have little experience with bowling whereas for many children in the Midwest, it is more common. Various tips were given, and teases passed between the two teams. After the first round ended in a tie, a second round was quickly set up to determine the true winner. Between the Boys vs Girls, the boys came out victorious.

Pumpkin Pie Making. As a requirement, each incoming class of pledges has to plan an event for the chapter. In a joint service-social event, members came together to make pumpkin pies that would be delivered to shelters throughout the state for their Thanksgiving dinners. It got





a bit messy at times, but it was a wonderful experience. More than a few members successfully made a pie for the first time and enjoyed helping each other form crusts and mix fillings.

Movie Night. On December 1, members took an exciting opportunity to watch the new movie *Fantastic Beasts and Where to Find Them*. Conversation sparked afterwards and viewpoints were shared on this new addition to the Harry Potter franchise. This bonding

experience brought the chapter together and set a memorable experience for years to come.

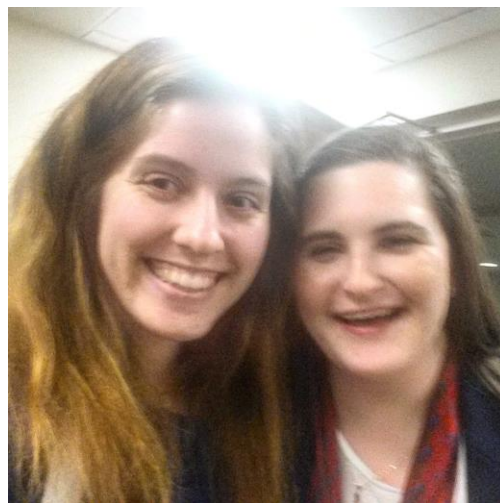
State Competition Practice. To prepare for Missouri's State Leadership Conference (SLC), we held an event that allowed members extra time to practice and work on events; both performance and objective testing. The objective testers took practice tests and went over study materials with each other. The performance competitors fine tuned their events and performed while the other performers offered tips to make their performance a little better.

Sardines. A social hide-and-seek game that has been modified to make it even more entertaining. One person hides in a designated building on campus while everyone else splits up to look for them. As the hidden person is found by different seekers, the seeker joins the hidden person. This continues until the last of the seekers has found the hidden group that is now packed together like sardines. The fun game offered a nice stress reliever from college responsibilities.

Game Night. This creative event had members searching a building for hidden numbers to solve sudoku puzzles before things intensified with a game of Questions.

Bowl for Donations. The Spring 2017 pledges decided to host a social event with a service component at Leisure World Bowling Alley. After two rounds, our average individual score was 92 which is the amount we will donate to the Adair County Humane Society.

Social media. We have also been active on social media as managed by Vice President of Public Relations Lu Meng and later again Taylor N. Libbert. Since the beginning of this academic year, our Truman Phi Beta Lambda Facebook page has gone from 121 to 137, our @TrumanPBL Twitter has grown from 115 followers to over 200 with most of the new followers being other FBLA-PBL chapters. This year, we continue to build our @TrumanStatePBL Instagram account which now has over 200 followers and has had engagement from other chapters across the nation. Our most popular post is Taylor's selfie with Kimberly Clark from Culver-Stockton College, our Missouri PBL Vice President of Membership and our National PBL Secretary. Lastly, we updated our chapter website at the start of each semester to include revised documentation, officer photos, and recruitment information. This was helpful because we also used the website information to create info sheets for our Admissions Office to take down to SLC.



ACTIVITIES TO BENEFITS OTHER INDIVIDUALS AND ORGANIZATIONS

State and National Projects

Our chapter has always supported state and national projects. For instance, Truman PBL dedicates one service event each semester to March of Dimes. This autumn, we held a fundraiser at TruYo, a local frozen yogurt eatery in Kirksville, from which proceeds were donated to the March of Dimes. This spring, members collected \$72.83 in donations using baby bottles. Moreover, we have a member, Taylor, who has completed the President Career & Membership Achievement Program (CMAP) level. Alexis has begun the CMAP, and we are encouraging two freshmen – Evan and Monica – to start so they may be eligible to run for a Missouri PBL executive position at SLC 2018.

Honor the Legacy, Support the Troops was the Missouri FBLA-PBL project this year. In November, members wrote letters of gratitude for military personnel so that they will arrive before Christmas.

Other Community Service Projects

This year, Truman PBL has grown through service for our campus and the surrounding community. In the fall semester, our chapter partnered with the Buddy Pack Program to assist in packing bags and distributing the supplies to children in need to ensure that they had ample food for the weekends. Working together with Kirksville's Salvation Army Store, PBL volunteered by organizing and taking inventory of the donations for sale. Around Thanksgiving, PBL worked together to prepare homemade pumpkin pies for food pantries in our hometowns. In the spring semester, as well as the fall, PBL kept our adopted nice blocks in Kirksville clean of litter before enjoying a lunch at a local restaurant. The first service event of the 2017 year was with Hope's Kitchen, a local organization that provides a hot meal to those in need in Kirksville. The members of PBL enjoyed an early morning cooking chicken parmesan for over 200 individuals. Truman PBL is also partaking in The Big Event, a campus wide service event. This year like in previous years, we volunteer to help the elderly of Kirksville with whatever they need, which is usually yard work or tidying up. Our pledges planned a unique way to donate to the local



Humane Society by bowling for the donation. Our average score was 92 points; thus, \$92 was donated. We finished the year by making dog toys from old t-shirts to also be donated to the Humane Society.

CONFERENCES AND RECOGNITION

Participation in PBL Conferences

SLC. Missouri Phi Beta Lambda's 57th annual State Leadership Conference (SLC) was held on April 23, 2016, in Springfield at the University Plaza Hotel and Convention Center. While there with 13 members in attendance, our chapter earned one of three Missouri spots for Hollis & Kitty Guy Gold Seal Chapter Award of Merit along with other individual awards. This April was our first 2016-17 conference together as a chapter.

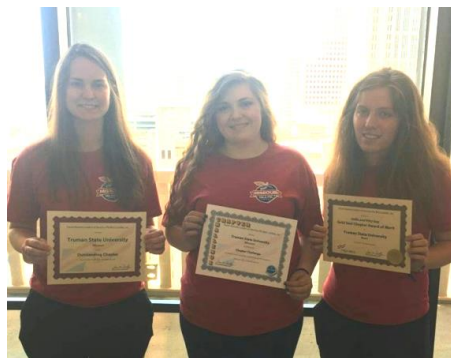
NLC. We had one guest and three members in six events attend the 2016 National Leadership Conference (NLC) in Atlanta, Georgia. Our chapter earned several chapter recognitions. Taylor N. Libbert, then sophomore Romance Languages student, had the honor of being awarded the only National PBL Distinguished Business Leader scholarship. She used the time backstage during Opening Session to get pictures with the keynote Logan Weber and with the FBLA-PBL CEO Jean Buckley. Attendees attended workshops on the chemistry of business and on the proposed by-law amendment in addition to going on the March for Babies walk.

Other conferences. Later that summer as the new Missouri FBLA-PBL Activities Assistant, Taylor took the initiative to present two workshops on budgeting and interviewing at the Missouri FBLA Executive Leadership Conference (ELC) at the Lodge of the Four Seasons in the Lake of the Ozarks. The open tests she wrote the previous year were used again this year at the Missouri FBLA-PBL Show-Me Leadership Conferences (SMLCs) held at amusement parks across the state. She found the time to attend an FBLA DLC Grading Day in St. Charles over winter break. She designed a workshop for District Leadership Conferences (DLCs) in advance before traveling to Kirksville and Chesterfield for those conferences.



Other Chapter and Individual Recognitions Earned

Without our members, our chapter would not exist, and we emphasize this importance at the end of each semester with a banquet. We give personalized certificates to the Most Outstanding Active Member, who was Hailey Ketchum. Most Outstanding Pledge, Most Outstanding in Service, and Most Outstanding in Social were tied between Shuting Deng and Monica Hunter this fall. In addition to these awards, we give graduation cords, cards, and small gifts like a picture frame to the members who are graduating. We ask for the graduates to share their favorite PBL memories and as well as for other members to share stories and sentiments about the graduates themselves. Our outgoing President receives a gavel as a symbol of their demonstrated leadership. We raffle off prizes at the end to a select number of members who have done extra small tasks throughout the semester. Finally, for the past two years, a member has been nominated for an award for the university's Leadership Recognition Program. Although only a finalist, it is a great chance to reward the hard work she demonstrated.



Competitive Event Winners and Participants

SLC 2016. Of the 17 registrants, below are the 13 members who were recognized.

Accounting Principles	2 nd	Logan Yang
Administrative Technology	3 rd	Alexis Caraker
Business Communication	1 st	Alexis Caraker
Client Service	5 th	Taylor N. Libbert
Contemporary Sport Issues	2 nd	Joshua Gregg
Cost Accounting	1 st	Logan Yang
Economic Analysis & Decision Making	1 st	Hien Nguyen
Entrepreneurship Concepts	1 st	Thang Nguyen
	4 th	Rebecca Stearns
Financial Concepts	3 rd	Loc Huynh
Hospitality Management	2 nd	Hailey Ketchum
Information Management	5 th	Hailey Ketchum
International Business	3 rd	Truc Tran
Local Chapter Annual Business Report	1 st	Truman State University
Macroeconomics	2 nd	Hien Nguyen
Management Analysis & Decision Making	1 st	Taylor N. Libbert
Marketing Concepts	5 th	Ariel Logan
Organization Behavior & Leadership	4 th	Thang Nguyen
Personal Finance	2 nd	Kelsey Beasley
	4 th	Thang Nguyen
Statistical Analysis	2 nd	Kana Kotani

NLC 2016. Our chapter was recognized for our collective hard work.

Chapter Challenge		Truman State University
CMAP President		Taylor N. Libbert
Distinguished Business Leader		Taylor N. Libbert
Hollis & Kitty Guy Gold Seal Chapter Award of Merit		Truman State University
Local Chapter Annual Business Report	2 nd	Truman State University
Management Analysis & Decision Making	3 rd	Taylor N. Libbert
Outstanding Chapter Recognition		Truman State University

