



YOUR BUSINESS ADVANTAGE
FOR LIFE

Pi Sigma Epsilon
Gamma Chi
2007 Chapter Annual Report

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Chapter Historical Analysis

The Sales and Marketing Executives International of Baton Rouge chartered the Gamma Chi Chapter of University of Louisiana at Lafayette (UL Lafayette) in 1983. For several years, the Gamma Chi Chapter has celebrated many successes, challenges, and even extinction. Through the inspiration of the UL Lafayette College of Business, the Gamma Chi Chapter has once again emerged as a resource for professional growth. With its core focus to enhance its members' potential for career placement, the Gamma Chi Chapter has set realistic goals to achieve success for its students, its campus, and its University. Upon its re-chartering, Gamma Chi has worked hard to regain recognition and support throughout the University and the community.

Over the past year, Gamma Chi has recruited seven new members, gained a new faculty liaison, substantially increased member participation and activity, and received community and university recognition. Recruitment in the Fall 2007 semester has produced seven prospective new members and re-activated one of Gamma Chi's original charter members. The Gamma Chi chapter is currently chartering a SMEI chapter in Lafayette with support coming from PSE Headquarters, SMEI Baton Rouge, SMEI Incorporated, Lafayette Chamber of Commerce, and the B.I. Moody III College of Business Administration. Since the Spring of 2007, Gamma Chi has become a prosperous chapter with high expectations from its members, community, and university.

An increase in community involvement projects has given Gamma Chi special recognition from the community and UL Lafayette. Projects included chapter participating in Habitat for Humanity, celebrating Founder's Day, networking with local business professionals, learning valuable lessons from guest speakers, participating and planning an etiquette dinner, and researching potential markets for local businesses Lafayette.

Today, the Gamma Chi Chapter is a stable and strong organization that is prepared for growth and long-term success. Gamma Chi has several ideas that will help the members in their professional lives and help them unite as a chapter. The Chapter has brainstormed on various ideas for projects including a Bike Day in our popular local park, teaming with the University for a market research Project, and spreading our name throughout Lafayette by publicizing research. Through these projects, we hope to increase our membership by gaining a reputation amongst the student population.

SWOT Analysis

Source: Situational analysis and primary research collected from Gamma Chi's Executive Board and members of the chapter.

Strengths

- Executive Board
- Chapter support
- Cash flow
- Faculty advisor, Dr. James Underwood
- Little to no competition
- Networking
- Maintaining chapter morale

Weaknesses

- Weak brand image
- Constant loss of members due to graduation
- Lack of chapter participation
- Small chapter size

Opportunities

- Ellen Cook- acting Dean of College of Business
- Craig Duplechin- Past Alumni
- Frank Wallace – Marketing Professor of the University
- Sales Marketing Executives International of Baton Rouge
- Relationships with Lafayette businesses
- Support from our friends at Beta Xi

Threats

- School restrictive policies on all campus organizations
- Time constraints
- State decision regarding campus budget due to hurricanes
- Student apathy

Chapter Goals and Strategies

Set Chapter Goals:

Increase chapter communication by 50% by the end of the CEI year.

- Survey members at the beginning and end of the year
- Update members every week on the status of the chapter
- Utilize Gamma Chi's new website for communication
- Update website every week or as often as necessary

Build a relationship with the Lafayette Chamber of Commerce

- Communicate information through Dr. Bob Bush, previous chapter advisor
- Start a SMEI Chapter in Lafayette

Meet or exceed member satisfaction by 70%

- Recruit new members and keep the retention rate high
- Satisfy members' needs and wants
- Create more social meetings or events for membership enjoyment

Accomplished Goals:

Increase chapter communication by 50% by the end of the CEI year

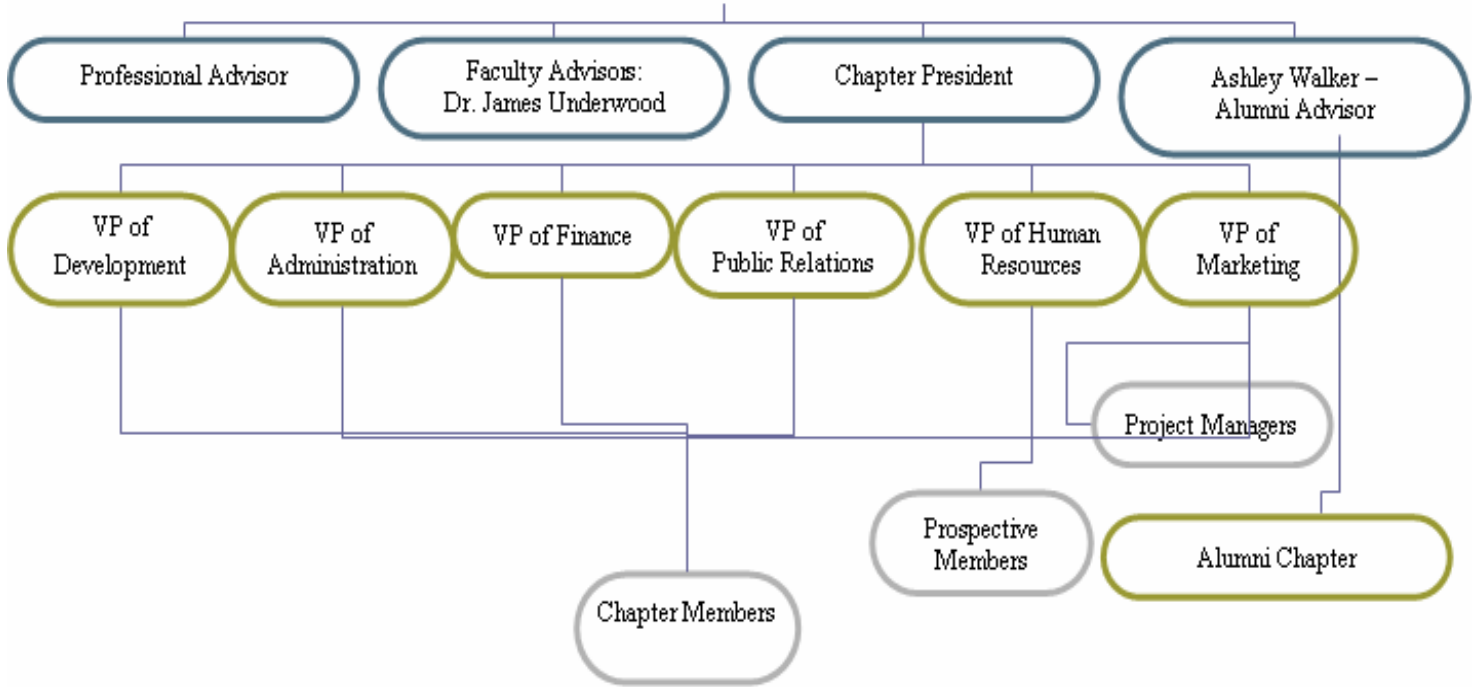
- Utilize Gamma Chi's new website for communication
- Update website every week or as often as necessary
- Print a newsletter with local current events directly affecting the members
- Update members every week on the status of the chapter at weekly chapter meetings

Meet or exceed member satisfaction by 70%

- Recruit new members and keep the retention rate high
- Satisfy members' needs and wants
- Create more social meetings or events for membership enjoyment

Personal Plan

Gamma Chi Organizational Chart



Job Descriptions

President

The President is responsible for delegating officer responsibilities to ensure they meet all required duties. He or she will lead and maintain professionalism at all Executive Board Meetings and General Business Meetings. They will assure the obedience to the Chapter Bylaws and National Pi Sigma Epsilon Ethics. With the support of the Executive Board members, the President can release any officer from their duties if they are not fulfilling their obligations to the fraternity. He or she will maintain a positive communication between chapter members, National Headquarters, professional partners, the College of Business, and the University of Louisiana at Lafayette.

Vice President of Administration

The Vice President of Administration is responsible for keeping accurate and complete minutes of all chapter meetings. He or she maintains precise and updated records of all chapter activities. He or she is also responsible for providing the chapter with monthly calendars. He or she is responsible for

keeping the Executive Board members and Chapter members updated on CEI requirements. This person also acts as a liaison between our chapter and National Headquarters. In the absence or disability of the President, the Vice President of Administration will succeed to his or her power and duties.

Vice President of Public Relations

The Vice President of Public Relations is responsible for communicating chapter activities with all chapters in the Southern Region, alumni, and National Headquarters. The Vice President of Public Relations also is responsible for creating and maintaining an alumni database, and responsible for recognizing and inviting alumni to all chapter events. This person will also be responsible for maintaining alumni relations through verbal and written communication channels. He or she is responsible for building and maintaining a relationship with local media to publicize chapter activities. He or she is responsible for following up after any chapter function to thank the appropriate people in written form. He or she is also responsible for maintaining a relationship with area professional organizations (Sales and Marketing Executives International of Baton Rouge and Greater Lafayette Chamber of Commerce).

Vice President of Human Resources

The Vice President of Human Resources is responsible for all recruiting activities, appointing other members or officers to aid in recruitment if deemed necessary. This person will keep the chapter updated with a quarterly phone list of all members and advisors. It is also the responsibility of this person to oversee the recruitment of professional, educator, and alumni members in order to benefit the chapter as much as possible.

Vice President of Finance

The Vice President of Finance is responsible for keeping accurate records of all income and expenditures that occur within the chapter. The Vice President of Finance all collects and submits National dues, Chapter dues, Initiation fees, and any other incoming money to the chapter. He or she is responsible for collecting money and ordering cords for graduating seniors every semester.

Vice President of Development

Vice President of Development is responsible for keeping communications with chapter Alumni. He/She schedules appropriate guest speakers at chapter meetings to increase business knowledge among the chapter members. The Vice President shall communicate with all chapters in the Southern Region and report activities to the chapter.

Vice President of Marketing

Vice President of Marketing is responsible for all marketing, sales, service, and research projects. He or she appoints project managers for each project and

assists the project managers when needed. This person will meet with the project managers to maintain progress on all projects throughout the course of time. When the project is completed, the Vice President of Marketing will then write the CEI report.

Chapter Activity

Chapter marketing, market research, community service projects:

Community Service

Each semester, the chapter volunteers to help out the less fortunate. The chosen community project has been Habitat for Humanity, helping build homes for those in need. Chapter members join with other organizations and the new homeowners in building the house, landscaping, and detail finishing of the new houses.

A most enjoyable event the chapter participated in was the Easter Egg Hunt for the University's Day Care on campus. Members put together coloring activities and set up different Easter Egg hunts for classrooms of children varying between 2-6 years old.

The Gamma Chi chapter has previously adopted a road in Lafayette near campus for the purpose of maintaining its beauty. Each semester chapter members volunteer to clean up the adopted road to ensure its cleanliness.

Chapter Marketing, Market Research Projects:

In the Spring of 2007, chapter members participated in a Mystery Shopping project for Teche Federal Bank, a local branch in Lafayette, Louisiana. Members went into chain and competing banks and evaluated the service that was given to them. Evaluations consisted of the cleanliness of the facility, the personal service provided, the friendliness of employees, and how well employees pursued their customers.

Chapter members presented a Target Market Analysis for Candace Saucier, a local representative for Juice Plus/NSA. Members brainstormed on the target market she should pursue and gave complementing research of where this market was in the Lafayette area.

The chapter has been working on a Market Research project for HLR Controls, a local business in the oil and gas industry. Though not finalized, the chapter has been researching a new product the company has developed and determining what other industries could make use of it.

In the beginning of the Fall 2007 semester the chapter put together a Plate Lunch Sale. This semester's Project Manager reviewed the previous year's plan and revised it. He decided to have a delivery service for the lunches. This increased the project's sales incredibly and had increased customer satisfaction.

Professional programs:

Networking

Members of the chapter participated in the Launch for a new local group formed in Lafayette called the705. Membership for this group is restricted to the 'younger' generation of 20-40 year olds in the community. A couple of PSE members joined this new organization, but all were invited to network with the local business professionals. The mission of the705 is to become the voice of the younger generation in Lafayette and prove that we care and get involved with issues affecting Lafayette.

Extra Curricular Activities

The chapter has many extra curricular activities, few of which are documented with the headquarters of PSE. On many occasions, chapter members go out to restaurants, cook dinner at one person's house, go to movies, play at the local parks, have game nights, and relax at local pubs.

Guest Speakers

Bart Boyer with Teche Federal Bank spoke to the chapter twice. Once he spoke of motivating the people around you, the other he spoke of how to keep yourself determined without degrading anyone in the work environment.

Kim Billeaud with the University of Louisiana at Lafayette's Career Services department spoke to the chapter twice as well. Both instances she informed members on how to present themselves during interviews, dinners, or any other professional occasions.

Allison Broussard with Enterprise Rent-a-Car spoke to our chapter twice as well. She informs members on what attire is appropriate for professional occasions. She also informed the chapter of the great intern opportunities that her business has for students.

Audrey Price, a professor at the University of Louisiana at Lafayette, spoke to the chapter about her personal experience of entering the "real" business world. Being a younger professional, the members really seemed to appreciate her words of wisdom on entering into future career paths.

Membership

Recruiting

Every year Gamma Chi starts recruitment with the hopes of doubling chapter size each semester. Unfortunately in the Spring of 2007 we were not able to do that. Despite recruitment efforts we were unable to recruit anyone. Going into the Fall semester we took a look at what needed to change regarding recruitment. We know we needed to recruit people and change recruitment a bit.

We continued with flyers, classroom speeches and word of mouth advertising. All of these have been really effective in the past and proved to be so again in the Fall semester when we recruited seven new members. Six of the new members are juniors and one is a senior. Two of the juniors are finance majors and five are marketing majors. We were also able to re-recruit one of our founding members from our re-charter in 2004.

Achievement

Gamma Chi had several members that achieved excellence this year. Our VP of Marketing, Annika Holmgren, became the President of Mu Kappa Tau. We had three members on the Dean's List; Annika Holmgren, Nicole Gavin and Ann Horton. Three of our members joined a new community organization called the705. The705 is comprised of young professionals and students who are trying to make changes in the Lafayette area. They are Elise Gautreau, Steven David, and Nicole Gavin. We also had a member win the NFL Super bowl as defensive tackle and left tackle for the team Louisiana Storm. This member is Jarred Keys who is also graduating this semester.

Outcomes

Throughout the year, we measure our chapter's success by our increase in membership. We still feel that we are a successful chapter if we retain at least 60% of our chapter (in respect to graduating seniors.) We also believe we can measure our success by whether we increase our membership by at least 50%.

The Gamma Chi Chapter hopes to continually increase its member participation in chapter events. We believe that a successful chapter has at least 75% of member participation. We know that by taking surveys we can find out what members want to be involved in and by holding such events, successfully maintain a 75% participation rate.

Gamma Chi will also measure the success of our chapter by the quantity and quality of the projects we have. By setting goals for each project, we can accurately find out how successful each was.

We feel as though these will be the best ways to measure Gamma Chi's success. If we begin to slack in any of these areas, we will be able to locate the problem and find what it is that needs to be done to better motivate our chapter members.

Chapter Goals Calculations	
Chapter Size 2006	Chapter Size 2007
14	18
Projected recruitment:	7
Actual recruitment:	8
Retention Rate:	71.43%
Member Usage of Website:	77.78%

Financial Statements
See Next Page

PI SIGMA EPSILON

A National Professional Fraternity in Marketing, Sales Management, and Selling



Gamma Chi

Budget - Actual

For the Period July 1, 2007 to December 31, 2007

Opening Balance - July 1, 2007 \$ 3,337.81

ESTIMATED INCOME

ESTIMATED ADMINISTRATIVE INCOME:

	# of Meml	Dues Fee	Total
New Member Initiation Fees (Fall)	7	\$ 50.00	\$ 350.00
New Member Annual National Dues (Fall)	7	\$ 60.00	\$ 420.00
Current Member Annual National Dues (Fall)	9	\$ 60.00	\$ 540.00
Chapter Dues (Fall)	17	\$ 30.00	\$ 510.00
Lifetime Membership	0	\$ 400.00	\$ -
SMEI Scholarship			\$ -
University Support Funding			\$ -
Annual Corporate Sponsorships			\$ -

TOTAL ESTIMATED ADMINISTRATIVE INCOME: \$ 1,820.00

ESTIMATED PROJECT INCOME:

Plate Lunch Sale (Fall)			\$ 745.00
New Member Project (Fall)			\$ -
Etiquette Dinner			\$ 150.00

TOTAL ESTIMATED PROJECT INCOME: \$ 895.00

MISCELLANEOUS INCOME

Interest Income			\$ 16.38
HQ Reimbursements			\$ 45.32
Miscellaneous Income			\$ 25.00

TOTAL ESTIMATED MISCELLANEOUS INCOME: \$ 86.70

TOTAL ESTIMATED INCOME: \$ 2,801.70

ESTIMATED EXPENSES

ESTIMATED ADMINISTRATIVE EXPENSES:

	# of Meml	Dues Fee	Total
New Member Initiation Fees (Fall)	7	\$ 50.00	\$ 350.00
New Member Annual National Dues (Fall)	7	\$ 60.00	\$ 420.00
Current Member Annual National Dues (Fall)	9	\$ 60.00	\$ 540.00
Lifetime Membership	0	\$ 400.00	\$ -
PSE Southern Regional Conference			\$ 404.26
Chapter T-Shirts (Fall)			\$ 770.00
Banking Fees			\$ 21.50
Office Expense			\$ 75.82
PSE Name Tags			\$ 28.06

TOTAL ESTIMATED ADMINISTRATIVE EXPENSES: \$ 2,609.64

ESTIMATED PROJECT EXPENSES:

Plate Lunch Sale (Fall)			\$ 302.06
New Member Project (Fall)			\$ -
Etiquette Dinner			\$ 173.40

TOTAL ESTIMATED PROJECT EXPENSES: \$ 475.46

ESTIMATED OFFICER EXPENSES:

President			
Printing			\$ -

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Gamma Chi

Grad Cords	\$ 57.00	
Supplies	\$ -	
TOTAL ESTIMATED EXPENSE	<u>\$ 57.00</u>	
VP of Admin		
Printing	\$ -	
Supplies	\$ -	
TOTAL ESTIMATED EXPENSE	<u>\$ -</u>	
V.P. of HR		
Printing	\$ 11.52	
Incentives	\$ -	
Initiation	\$ -	
Recruitment Expense	\$ 6.48	
TOTAL ESTIMATED EXPENSE	<u>\$ 18.00</u>	
V.P. of Finance		
Printing	\$ -	
Supplies	\$ -	
Postage	\$ -	
TOTAL ESTIMATED EXPENSE	<u>\$ -</u>	
V.P. of Marketing		
Printing	\$ -	
Supplies	\$ -	
TOTAL ESTIMATED EXPENSE	<u>\$ -</u>	
VP of Development		
Printing	\$ -	
Postage	\$ -	
Professional Programming	\$ -	
SMEI Meeting	\$ -	
TOTAL ESTIMATED EXPENSE	<u>\$ -</u>	
V.P. of Public Relations		
Printing	\$ -	
Website	\$ 29.94	
TOTAL ESTIMATED EXPENSE	<u>\$ 29.94</u>	
TOTAL ESTIMATED OFFICER EXPENSES		<u>\$ 104.94</u>
TOTAL ESTIMATED EXPENSES		<u>\$ 3,190.04</u>
TOTAL ESTIMATED BALANCE (Income minus Expenses)		<u>\$ (388.34)</u>
	Ending Balance - December 31, 2007	\$ 2,949.47

Conclusion

Overall, the chapter as a whole still needs improvement. With the lack of genuine member participation, the Gamma Chi Chapter is not operating as efficient and great as it should be. Many great ideas were brainstormed, but the actual work always came down to a select few chapter members. The challenge is to make students realize the potential greatness they can achieve through Pi Sigma Epsilon.

It is recommended that the chapter find a way to encourage members to understand the meaning and benefits of Pi Sigma Epsilon. If this is accomplished, it might change the participation level and excitement that only a few truly encompass. It is projected that Gamma Chi will gain the connection to the Lafayette Chamber of Commerce and stand out in a positive manner to the University of Louisiana at Lafayette. With these projections, the chapter will be able to participate in more skill oriented projects and recruit more students who take pleasure in the business environment.