



*This template document was created by the Cornerstone Housing Program in 2014. It is intended as a resource for Beta Theta Pi's house corporations when looking for a fundraising vendor. We encourage house corporations to solicit proposals from more than one vendor and evaluate them against an objective set of criteria.*

*If you'd like a Word doc / editable version of this document, please contact Anne Emmerth ([anne.emmerth@beta.org](mailto:anne.emmerth@beta.org); 800-800-BETA).*

## **Sigma Rho Chapter of Beta Theta Pi / University of Illinois Request for Proposal for Alumni Communication and Fundraising**

**Request:** The Sigma Rho Building Association of Beta Theta Pi (University of Illinois) is soliciting proposals for alumni communication and fundraising services.

**Contact:** The main contact for this proposal is Dan Fogle, a member of the building association ([dan.fogle@gmail.com](mailto:dan.fogle@gmail.com); 901-569-0946 (cell)). Dan is the volunteer on the board who is coordinating the RFP process.

*We recommend that the house corporation appoint a single person to coordinate and communicate with vendors; some house corporations have a fundraising sub-committee that does all of the research on vendors and then presents a recommendation to the board. Whatever method you use, we recommend that the final selection of your vendor be documented in your board meeting minutes. Here's some language:*

*It was moved (John Miller) and seconded (Peter Smith) that the house corporation board allocate \$xx,xxx to contract with VENDOR to conduct a fundraising feasibility study, to begin in spring 2014. The motion passed.*

*It was moved (Steve Smith) and seconded (John Miller) to allocate an amount not to exceed \$xx,xxx to contract with VENDOR to conduct a fundraising campaign, to begin in summer 2014. The motion passed.*

**Background:** The Sigma Rho Chapter of Beta Theta Pi was founded in February 1902 at the University of Illinois – Champaign Urbana. For most of its history the Sigma Rho Chapter was a strong and respected chapter on campus and within the Beta family. The chapter closed in 2009 for risk management reasons, a decision that was supported by the university and the alumni volunteers. In the final years before it closed the chapter experienced increasing risk management issues and slightly declining membership numbers.

The Beta chapter house is at 202 E. Daniel Street in Champaign, Illinois. It is a 100+ year old structure with a very traditional architectural style (brick, columns). The capacity of the facility is mid-40s. After the chapter closed, two alumni continued to manage the facility; it is currently being rented to another fraternity.

**Current Status:** Beta will reestablish its presence at Illinois with re-colonization efforts in fall 2013 with the full support of the university. Per Beta’s standard model, there will be a full-time staff member on campus for the full 2013 – 14 academic year to recruit advisors and the initial re-colonization class. The colony will move into the Beta house in fall 2014.

In preparation for recolonizing, the house corporation board re-built its volunteer base. The board now includes these alumni:

- Jeff Tock (Illinois '70), president, [jtock@harringtontock.com](mailto:jtock@harringtontock.com)
- Dave McMurray (Illinois '81), secretary, [dwmcmurray1@gmail.com](mailto:dwmcmurray1@gmail.com)
- Jim Banaszak (Colorado Mines '83), treasurer, [jbanaszak1@comcast.net](mailto:jbanaszak1@comcast.net)
- Daniel Farmer (Cincinnati '75), [dfarmer@farmerarchitecture.com](mailto:dfarmer@farmerarchitecture.com)
- Lucas Siron (St. Louis University '04), [lucas.siron@gmail.com](mailto:lucas.siron@gmail.com)
- Dan Fogle (Miami '07), [dan.fogle@gmail.com](mailto:dan.fogle@gmail.com)

*In this section you should give an overview of the history of your chapter, including any chapter open or close dates and the reasons for chapter closure (no need to go into every single detail, but if the chapter closed for risk management reasons that had a significant negative impact on the alumni base, mention it). Also include an overview of the facility, if you own one, or any past facilities the chapter may have lived in.*

#### **Membership Statistics for Sigma Rho Chapter:**

- Total initiates: 2,141
- Total living alumni: 1,445
- Total living alumni with mailing addresses: 1,342 (14 of these Brothers were initiated before 1940 – it is possible that they are deceased)
- Total living alumni with email addresses: 539
- Number of “lost” brothers: 103 (26 of these lost Brothers were initiated before 1940 – it is possible that they are deceased)
- Many alums live in the greater Chicago area and work in the financial services and consulting industries.
- Living alums who have served in General Fraternity leadership roles:

- Gant Redmon (grad 1959), Fraternity Board of Trustees, 2003 – 2006
- Brian D. Boettcher (grad 1994), Assistant District Chief in the St. Louis area, 1996
- Prominent alums of whom we're aware:
  - Shahid Khan (graduated 1970), owner of Flex-n-Gate and Jacksonville Jaguars:  
[http://en.wikipedia.org/wiki/Shahid\\_Khan](http://en.wikipedia.org/wiki/Shahid_Khan)
  - Tim Koritz (graduated 1978), member of the University of Illinois board of trustees:  
<http://www.bot.uillinois.edu/koritz>

*Beta's Administrative Office can assist with these membership statistics.*

**Fundraising & Financial History:** To date the building association / house corporation has not had a consistent fundraising program. Past efforts included mailers with an appeal for donations but no consistent strategy or targeted appeals. To prepare for recolonizing, the General Fraternity refinanced an outstanding loan on behalf of the building association, pulling out additional operating cash. The building association has an outstanding loan of \$1.2 million; the property was recently assessed at \$2 million. Our cash flow from rental income barely covers our annual operating costs and needed day-to-day maintenance expenses.

The chapter house has good “bones” but is due for a major overhaul. We would like to capitalize on the excitement of the chapter returning to campus to undertake a large-scale fundraising effort for the purpose of:

- Paying off the loan (\$1.2 million).
- Renovating the facility (\$2 million; renovations would probably be done in phases so that the facility would not have to be closed for a significant period of time).
- Building a large cash cushion for the future (\$500k).

Based on these needs, our goal for fundraising is \$4 million. As part of this process we want to establish an annual fund campaign so that alums will continue regular contributions.

We are familiar with the workings of Designated Educational Area Housing grants and are open to pursuing that as a fundraising vehicle.

*In this section you would lay out your reasons behind undertaking a campaign, including any cost estimates for facility acquisition or renovation. This is the core of your case statement. If you have any fundraising history or experience with a previous campaign, include information about the year, purpose, total amount raised, and total number of donors.*

**Alumni Relations History:** In the past there hasn't been a coordinated alumni relations program. When the chapter was open this was primarily left to an undergraduate committee chair, with predictably inconsistent results. Alums do come back to campus for homecoming; in the final years when the chapter was open many alums who returned were disappointed by the condition and cleanliness of the facility and the quality and hospitality of the men living there. There doesn't seem to be much anger or resentment about the chapter closure among alums – if anything, some of them feel that, given the direction the chapter was headed, it was a good decision to close.

There is a core group of alums from the 1980s who have continued to meet and hold an annual golf outing in Champaign. Our assessment is that most alums are loyal to the university and to Beta and want to see the chapter be a strong presence on campus once again. They have strong feelings about the chapter house and want it to be a premier facility on campus.

As part of preparing for re-colonizing, the building association has started sending periodic e-newsletters to alums with email addresses and hosted a happy hour for Chicago-area alums. About 15 people attended. We hope to plan more events in the future.

*A strong alumni relations program and an engaged alumni base will make it easier to raise money and find volunteers to serve on your fundraising committee. Include information about organized activities or “unofficial” activities (e.g., pockets of Brothers or certain pledge classes that stay in touch).*

#### **Timeline for Selecting a Fundraising Partner:**

- March 22, 2013: RFP sent to vendors
- March 25 – 29: Willing to schedule phone call between vendor and house corporation board members to answer questions or learn more
- April 12, 2013: Proposals due to Dan Fogle via email (or some other method where the proposals can be shared / uploaded to other board members)
- April 12 – 19, 2013: Building association evaluates proposals and determines which vendors need face-to-face meetings
- May 5, 2013: Building association meeting in Champaign, IL. The main agenda item is meetings with fundraising vendors and a decision about next steps.

*This will help the vendor understand your timeline for receiving a proposal and making a decision about a vendor.*

#### **Proposal Should Include:**

- Proposal for ongoing alumni communication plan, formatted “cafeteria style” so that we can see what services are available at what cost.
- Proposal for campaign fundraising. Please detail approach, sample timeline, resources committed from your company, and cost.
- Proposal for managing an ongoing annual campaign.
- Detailed implementation timeline.
- For all of the above, please describe the resources or level of effort you’ll need from the house corporation board. For instance, how much work do you expect the board members to do? Will we be making phone calls? Organizing events? Going on donor visits?
- Company profile.
- Professional profile(s) of proposed account manager(s).
- References from three recent or current clients, including at least two non-Beta references and one sorority reference.

*The more specific you are about what you're looking for in the proposal, the better response you'll receive from vendors. A list like this also lets vendors know that you're approaching this process in a serious, professional way. The request for a sorority reference is based on the belief that sorority house corporation boards / alumni can be somewhat demanding – if a vendor can make them happy, they're probably OK.*

**Evaluation Criteria:**

- Timeline / ability to mobilize quickly.
- Cost.
- Experience on a similar project / campus and chapter profile.
- References.
- “Fit.” We know that this will be a long-term relationship; we want a fundraising firm with which we can partner closely.

*This helps your vendor understand how you'll be evaluating the proposal. For instance, for some boards the ability to mobilize quickly is very important. For others, it's proven success on your campus or with your campus alumni.*