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*Philadelphia, a city built on history, is a great place for the Fraternity to celebrate its 75th Anniversary convention.*

## See you in Philly!

Imagine spending four days in a hotel with 3,000 of the most fun, dedicated, talented college students in the country. Imagine our National Convention!

It is a not-to-be-missed opportunity for all members and alumni of the Fraternity. The activities and celebration events that will be held at our National Convention in Philadelphia will be a once-in-a-lifetime happening. Our three principles of Leadership, Friendship and Service will be very visible throughout the convention. Each day we will be able to attend workshops and seminars, participate in service projects and, of course, enjoy friendship at all the activities being planned by the National Convention Committee. The efforts of the committee have been to prepare and present a National Convention like no other we have ever had. So, come one, — come all to Philadelphia. Help the Fraternity celebrate its 75th Anniversary National Convention.

## TORCH & TREFOIL

Winter 2000 Vol. 77 No. 2

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## PRESIDENT'S MESSAGE

BY JACK A. MCKENZIE, NATIONAL PRESIDENT

### A Remarkable Gift, A Remarkable Lady, A Remarkable Opportunity



For many people, the end of the calendar year is traditionally a time of giving gifts, remembering friends and family, and for APO people, going to a convention. This year, those three customs are merging to create a remarkable reason for celebration within Alpha Phi Omega.

First, the Fraternity has received a remarkable gift. Anonymous donors have given APO \$250,000 to be used primarily for strengthening and endowing leadership development programs, particularly those focused on chapters and the volunteers who work directly with chapters. You may recall that last year we created a "Leadership Fund" to be built up over time by donors who have pledged to make annual gifts for that purpose. This new gift furthers that effort and will greatly accelerate our ability to improve and expand our leadership development programs.

The gift is also meant to help us broaden our fund-raising activities. We have been challenged to create new programs and materials for our student and alumni members that introduce and promote the concept of giving to the Fraternity and that help all of us understand more fully the costs and tradeoffs associated with the work we do for APO.

The donors of this new gift seek no publicity for themselves. Instead, they have made their gift in honor of a remarkable lady, the late Mrs. Jackie Burke. Jackie was the wife of APO National Executive Director Patrick Burke. When she died suddenly and unexpectedly on December 4, 1999, the Fraternity lost a dear friend and frequent volunteer. In addition to supporting and joining Patrick in his work and travels, Jackie gave generously of her own time and energy in devoted service to the Fraternity.

Jackie was an example of all those "non-Brother" friends and family members who make it possible for us "official Brothers" to do what we do for APO. Their support, their understanding (especially about how and where we spend our holidays) and their faith in the principles and purpose of Alpha Phi Omega give us the security, freedom and inspiration to work for the Fraternity. The "Jackie Burke Gift" represents giving on many levels and in many ways. We are grateful for them all.

A remarkable gift. A remarkable lady. In a very short time, we will have a remarkable opportunity in Philadelphia to celebrate both of them as well as 75 remarkable years of Leadership, Friendship and Service. Beyond the celebration, however, our upcoming National Convention also will be an opportunity to make a mark on the future of the Fraternity. Be there. Be a part of the celebration. Be a part of the next remarkable era in Alpha Phi Omega.

*Jack*

# Letters to the Editor

Patrick Burke, Alpha Phi Omega National Executive Director and Torch & Trefoil Editor, welcomes your thoughts and comments.

MAIL TO: T&T Editor,  
14901 E. 42nd St., Independence, MO 64055,  
FAX: (816)373-5975, E-MAIL: Executive.Director@apo.org

## Dear Editor:

In honor of Alpha Phi Omega's 75th Anniversary, the Omega Chapter has decided to encourage 75 chapter members to purchase Life Memberships in the Fraternity. Included in this letter is a list of 28 Brothers who are submitting applications for Life Membership. We are planning to mail in another "batch" this fall before the National Convention. Currently our chapter has 40 Life Members, more than half of our 75 active Brothers.

*Kari Fass, Treasurer  
Omega Chapter  
Drake University*

*Congratulations to Omega Chapter.  
We encourage submissions as to how  
other chapters are celebrating our 75th  
Anniversary!*  
—Editor

## WE'RE LISTENING

We love to hear from our readers. Send us your comments, your suggestions, and your ideas furthering the goals of Alpha Phi Omega.

## Dear Editor:

The spring semester for Theta Zeta Chapter was exciting. We volunteered for a Special Olympics swim meet, participated in the UNH "Take Back the Night" march and held a "Senior Prom" for a nearby nursing home. There was a great turnout for the swim meet, and it was so much fun helping out all the athletes. "Take Back the Night" was an empowering event in which we marched as the APO team, making a statement against sexual assault and violence in our community. The "Senior Prom" was a special time spent handing out flowers, dancing, and conversing with the residents of the nursing home.

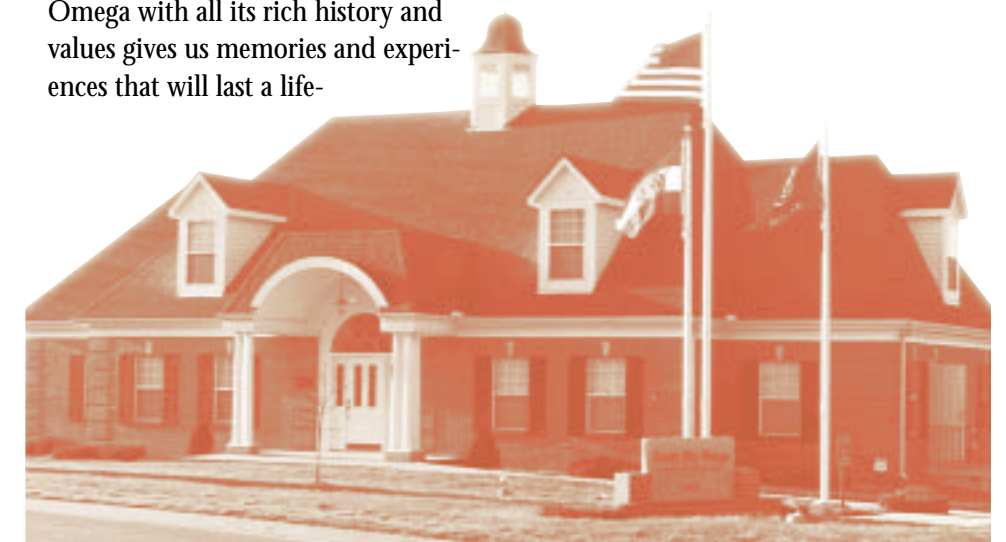
By giving our hands and hearts to service, we are gaining important lessons that we will carry for life. These unselfish actions build character and help us to search for more fulfilling life experiences. Being part of Alpha Phi Omega with all its rich history and values gives us memories and experiences that will last a life-

time. Years from now we will be enriched by APO memories.

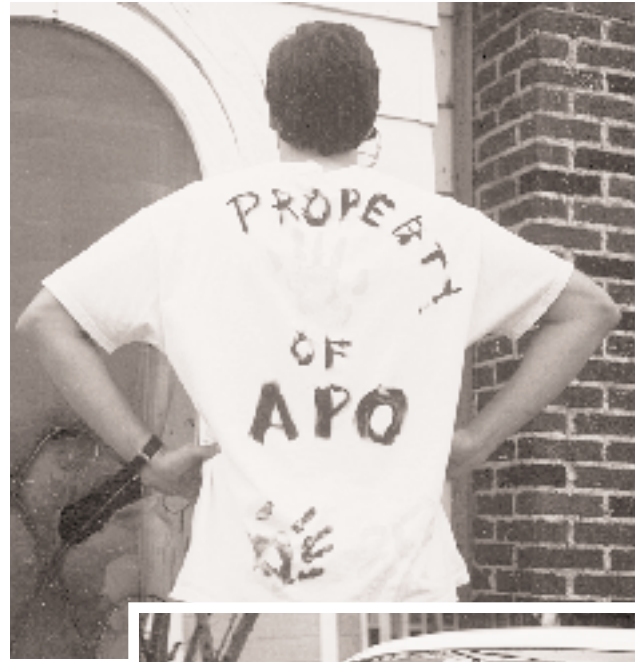
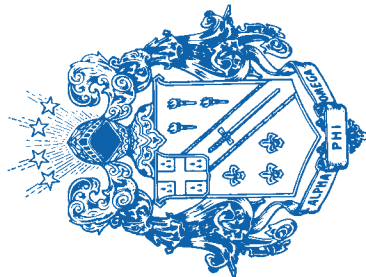
*Constance Sandini, Historian  
Theta Zeta Chapter  
University of New Hampshire*

*Normally, chapter activities are reflected on the "Chapters" pages. However, Constance Sandini, Chapter Historian, did such an excellent job of relating chapter history, it just seemed a good idea to share her letter and remind all chapters to keep good historical records.*  
—Editor

Can't visit our  
**National Office?**  
Visit our  
**National Web Site.**  
We're at  
**www.apo.org**



# CHAPTERS



**BETA DELTA**  
Texas A&M University  
Commerce, Texas

Last January the Beta Delta Chapter started the second semester with a wild and crazy idea. The Brothers planned their spring "Rush" with an artistic twist. They painted their cars to attract new members and increase their presence on campus. The chapter got so wound up in the project that the actives ended up painting themselves. It was well worth it as the chapter added 21 new Pledges which translated into 18 new Brothers for a total active membership of over 60.

**ETA SIGMA**  
Illinois College  
Jacksonville Illinois

Volunteering at a Ronald McDonald House is a service project for many of our chapters. The Eta Sigma Chapter did just that this past spring, taking on the responsibility one evening of purchasing, preparing and serving dinner for families staying at the McDonald House. If your chapter does this project, let the editor of the *T&T* know about it.



**EPSILON**  
Truman State University  
Kirksville, Missouri

**ALPHA PHI**  
Washington University  
St. Louis, Missouri



This past spring approximately 30 Brothers from Epsilon Chapter and Alpha Phi Chapter at Washington University, St. Louis, Missouri traveled to the Section 52 Conference in West Lafayette, Indiana. A traveling trophy was created to encourage participation in "Road Rallies." This is not a totally new idea but it really enhances your APO experience. How else would you be able to have your picture taken at a Purdue University fountain!

**BETA RHO**  
University of Arkansas  
Fayetteville, Arkansas

This last March over 400 Boy and Girl Scouts descended on the campus of the University of Arkansas. It was the 9th annual Scouting University hosted by Beta Rho Chapter. Scouting University allows Scouts the opportunity to come to the college campus and find resources sometimes not readily available in the community. This year Brothers from Phi Theta Chapter, Arkansas Tech University, Arkadelphia, Arkansas; Chi Chi Petitioning Group, University of Central Arkansas, Conway, Arkansas; Alpha Eta Chapter, University of Missouri at Kansas City, Kansas City Missouri; Alpha Phi Chapter, Washington University, St. Louis, Missouri; and Delta Mu Chapter, Kansas State University, Pittsburg, Kansas, joined Beta Rho in the one-day event. At the end of much work and a great lunch the Scouts gathered in a closing ceremony where they received a jacket patch designed by Beta Rho Chapter.



# LF & S WHAT'S GOING ON WITH

## Having a great 75th Anniversary National Convention: It's a Matter of Principles

The National Convention is a unique and exciting experience. With so many things to do and places to be, people to meet and sights to see, the convention is a four-day marathon of fantastic opportunities.

Here's a hint to help you make the most of the experience: Think of the Convention as a matter of Principles — as in our three Cardinal Principles.

### Leadership

Just going to the Convention is an act of Leadership. At the Convention, you will be a link between your chapter and the rest of the Fraternity. Whatever you do and wherever you go during your time at the Convention, you will be learning from others about their chapters and teaching others about yours. Together, we all will be representing Alpha Phi Omega.

Voting Delegates will demonstrate their Leadership abilities as members of the Convention Reference Committees and the Legislative Assembly. Delegates not involved in those activities will be able to hone their Leadership skills by participating in a wide range of workshops and seminars on everything from learning how to lead a meeting to learning how to lead your partner in "Swing" dance classes. On page 7 is a list of the Leadership Development programs planned for the National Convention.

### Friendship

Imagine spending four days in a hotel with 3,000 of your closest relatives — oops, forget that.

Instead: Imagine spending four days in a hotel with 3,000 of the most fun, most dedicated, most talented college students in the country — you know, people just like you.

There also will be business meetings and banquets and awards and prizes and chance conversations with people you just met from places you didn't even know existed.

In other words, anytime two or more delegates are together will be a Friendship opportunity. You will be able to attend and participate in unique theme dance parties, a no-talent show and special moments as we celebrate our 75th Anniversary. And you won't want to miss the very special final banquet!

Keeping our Friendship principle in mind will be especially important during discussions about Fraternity issues and chapter differences. Since we are a large and inclusive Fraternity, our members tend to have diverse opinions about what is best for our future and us. That's fine — providing a forum for debating and collectively deciding such issues is one of the reasons we have National Conventions in the first place. Our Conventions are milestones in Alpha Phi Omega's long

and proud tradition of tolerance and goodwill. It is a tradition started by our founder, who envisioned the Fraternity as a means to help people learn to resolve their differences sensibly, honorably and justly. We'll extend and strengthen that tradition in Philadelphia.

### Service

The National Convention is full of opportunities to be of Service to the Fraternity and to others.

A massive amount of work is required to keep the Convention going for four days. If you're interested in helping with any aspect of the Convention — from floor services during the Legislative Assembly to general safety and security — sign up on the volunteer's list when you get there.

In addition, there will be numerous Service projects during the Convention. Details about each will be available in the official program, but there's a partial list on page 7.

So make plans to attend the 2000 National Convention in Philadelphia. It's your Convention! Remember it's a matter of Principles... Leadership, Friendship, and Service!

# LEADERSHIP, FRIENDSHIP & SERVICE

## National Convention Service Projects

### Give the Gift of Life

At our National Convention you will have the opportunity to donate blood while you are having a great time. During the Convention, the American Red Cross will set up a station that should make your donation quick and easy. Giving the Gift of Life is a great gift!

### The Big Coat Drive

Bring your extra winter coats to the National Convention. This is a great opportunity to provide a service to the needy in Philadelphia. As at past conventions, Brothers who may have forgotten cold weather gear can borrow a coat during the convention and then return it to be donated.

### Stay Awake!

Have you heard of the Alma McLeod Foundation? If not, you can find out more about the McLeod Foundation at the National Convention and get a kick out of staying up all night to raise funds for this really great cause. Having fun and raising money at the same time is a great opportunity for all Brothers.

## Tentative Workshops

Advisors' Panel AIDS/HIV 101 The Alumni Real World APO Choir APO Founding APO Is Taxing: Your Personal 1040 Assertive Communication Techniques Basic Training for New Staff and Chairs Been There, Done That Building, Breaking, and Learning Chutes and Ladders of Service Community Outreach Made Simple Creating a Diverse Chapter Faith-based Leadership: An Alternative Lifestyle First Job Basics Foundations of Membership Friendship Development Workshop (FDW) Fund Raising for Your Chapter Growing Pains	How to Work Effectively with Volunteers "I'm Okay, You're Okay" Leadership Into the Streets - Working with Diverse Non- Profits Leadership Development Workshop (LDW) LDW Staff Development Life After College: Financial Planning 101 Motivation through Conflict Resolution Officer Transition Plans for APO Chapters Osteopathic Physicians: The "Other" Physician Planning for Retirement Recruiting and Retaining Advisors Reference Committees Chairs/Members/Advisors Orientation Refuse To Be A Victim (RTBAV) Retention Ritual Techniques Robert's Rules, Chapter Meetings, and You	SAA Supercommittee Saving the Titanic Chapter Service Roundtable Small Chapter Survival Speak in Front of a Group without Soiling Your Pants Taking Care of Your Brother: A Practical View Team Development Staff Training Team Development Workshop Tips for a Successful and Enjoyable (Re-)Charter Effort Volunteering Outside of APO Voting Delegates Orientation Chapter Web Page History of Scouting Hosting a Regional Conference Conference Planning Online Service Logs Psychogeometrics: What shape are you in?
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## Alpha Phi Omega 2000 NATIONAL CONVENTION SYNOPSIS Philadelphia, Pennsylvania

### Wednesday, December 27

- 8:00 a.m. Registration Opens
- 1:30 p.m. Orientation Workshop for all Reference Committee Chairs/Advisors and Reference Committee Members
- 3:00 p.m. Orientation Workshop for all Voting Delegates - Parliamentary Procedure
- 4:00 p.m. Regional Meetings
- 5:00 p.m. Orientation Workshop Reference Committee Chairs/Advisors
- 7:00 p.m. Opening Ceremonies
- 9:00 p.m. Reference Committees Begin Deliberations

### Thursday, December 28

- 7:30 a.m. Registration Continues
- 9:00 a.m. Regional Meetings
- 10:00 a.m. Reference Committees Meet
- 10:00 a.m. Workshops/Seminars Begin
- 12:00 p.m. Sectional Chair/Chapter Advisor Luncheon
- 5:00 p.m. Visit the Silent Auction Room and make a Bid
- 6:00 p.m. Fellowship Banquet and Dance - "Joe Dawson Band"

### Friday, December 29

- 8:30 a.m. Workshops/Seminars Con't.
- 9:30 a.m. Legislative Session Opens
- 4:45 p.m. Legislative Session Recesses
- 5:00 p.m. Regional Meetings - Candidates Visit Regions
- 6:00 p.m. Alumni Reception
- 7:00 p.m. Alumni Dinner (optional)
- 7:00 p.m. Fun and Fellowship Events
- 7:30 p.m. Legislative Session Resumes

### Saturday, December 30

- ... Legislative Session Continues
- ... Workshops/Seminars Continue
- 3:00 p.m. Regional Meetings - Elections
- 5:00 p.m. Board of Directors Meeting
- 6:30 p.m. Awards Banquet and Dance

# Frank Reed Horton...The Early Days

By Paul M.H. Lienhardt

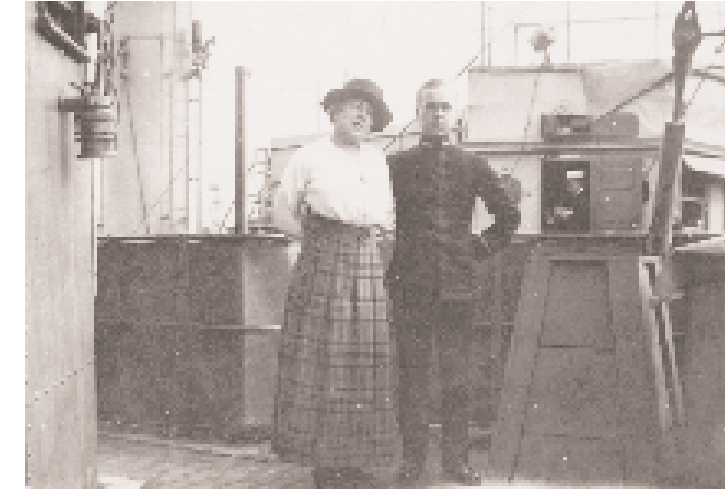
*The following article was written by Paul M. H. Lienhardt, '51, Alpha Psi Chapter, Lehigh University, Lehigh, Pennsylvania. Brother Lienhardt spent many hours of research on the early life of our Founder, and has given us a detailed view of Frank Reed Horton that might have remained hidden with the passage of time. We have all read "The Story of the Founding," written by our Founder, in the Pledge Manual. Here is the rest of his story. We are very grateful for the dedicated work, zeal, and determination that Brother Lienhardt has devoted to compile this historical aspect on the early life of our Founder, Frank Reed Horton.*

*Frank and his mode of transportation in about 1909.*



*LEFT: The USS Whippoorwill a World War I minesweeper, on which Ensign Horton was assigned from 1920-22.*

*BELOW: Aboard the Whippoorwill with his mother.*



## Early Years

Frank Reed Horton was born in Sewickley, Pennsylvania, (near Pittsburgh), on July 17, 1896. By the time Frank was 13 years old his family had moved to Easton, Pennsylvania. The year was 1910 and he was enrolled in preparatory school studies at Lerchs Academy, situated in downtown Easton, just a few blocks from Lafayette College. When the family moved to Norwalk, Connecticut, Frank continued his prep school studies at Worcester Academy in Worcester, Massachusetts. In the two years he attended Worcester Academy he played football, basketball and baseball. He also excelled in other school activities. He served as the Business Manager of the academy's weekly paper, *THE VIGORNIA*, and excelled in debate. He became a member of Sigma Zeta Kappa Debating Society. On June 7, 1913, presenting his topic "The Man Without a Country" by Edward

Everett Hale, Frank won the annual Dexter Award and a \$25 prize. In May 1914, Frank was elected to serve as president of the debating society.

In 1915 after leaving Worcester Academy Frank worked the next two years during the day as a law clerk for Robert A. Fosdick, Esquire, in Stamford, Connecticut; and at night he studied law extension courses from LaSalle College in Chicago. In the fall of 1916, at the age of 20, he enrolled at Boston University Law School, where his freshman courses were criminal law, agency, torts, sales, contract and property.

One of the more significant events in his life at this time was his joining in Sigma Alpha Epsilon social fraternity on November 4, 1916. It would be a few years later when, as a war veteran returning to school, he would find himself on the Lafayette College campus and residing at the SAE house. That would be the place where he

would begin Alpha Phi Omega.

As with many young people, Frank's parents were major influences in his life. Frank was close to his mother mainly because his father traveled a lot in his professional life. But even so, his father continued to wield heavy influence on Frank's law studies. Just as it would appear that Frank would continue his pursuit of law, the world war in Europe was felt in America. On April 6, 1917, the United States declared war against Germany. The War Army Act, a selective draft of 1,000,000 men ages 21 to 30, was passed by congress on May 18, 1917. Frank was 21. World War I would change Frank's focus forever.

## Masonry and the War Years

Although Horton's Masonry and war related experiences are not really inter-related they were both significant events occurring at the same time

period. On June 18, 1918, Frank entered the Blue Lodge, Scottish Rite Masonic order Western Star #37 A.F.&A.M. in Norfolk, Connecticut. Several years later he would expand his Masonic life while on naval duty in Kirkwall, Scotland.

On June 21, 1918, Frank R. Horton enlisted in the U.S. Naval Reserve Force at New London, Connecticut. He reported for training on July 22, 1918, in Newport, Rhode Island, as a Radio Electrician. He transferred October 5, 1918, to the naval unit at Boston University for additional studies. While there he achieved Chief Boatswain's Mate rating on December 19, 1918. It should be noted that Germany signed the Armistice effectively ending the war on November 11, 1918, yet many tasks for the military, especially for the Navy, needed to be completed. With a commitment to the Navy for almost two more years Frank continued to improve

himself, taking and passing competitive exams to become an officer. In 1919 he entered Naval Officers-Material Training School, at Harvard University, in Cambridge, Massachusetts.

Frank Reed Horton was commissioned an Ensign on April 17, 1919. He immediately reported to the First Naval District in Boston for active service on the USS Whippoorwill, a newly commissioned minesweeper. The first duty assignment for the ship was to the North Sea to participate in the detonation of 57,000 magnetic mines strung from Orkney Islands, just north of Scotland, and due east to Stavanger, Norway. Frank would serve as a Watch Officer, Navigation Officer, Signal Officer and Inspection Officer while on sea duty.

But it was Frank's previous legal training that drew him away from his regular assignments and into special duties with the navy court martial system involving young seamen. More

than a few, who, facing dangers and being away from home and lacking personal guidance, found themselves in trouble with navy rules and regulations. The matter of strengthening principles in young men would influence Frank forever. Here we see another significant event that would allow him to readily accept the principles of Scouting in his life as well as those of Rotary, Masonry and other organizations.

On August 8, 1919, at Kirkwall, Scotland, in the Orkney Islands, he entered the Royal Arch Chapter #209 of the York Rite. He would later receive Life Member Militia Templi Preceptory St. Magnus recognition on April 23, 1922, upon returning to the United States.

The USS Whippoorwill returned March 1920 to Charleston, South Carolina, with Frank obtaining his naval discharge June 23, 1920, in Philadelphia. He would earn the World

*BELOW: Frank Reed Horton with his mother and father.*

*RIGHT: After the war Frank spent time managing his father's farm.*



War I Victory Medal and the Minesweeper Clasp. From 1920 to 1922 after leaving the Navy Frank managed his father's 11-acre hog and chicken stock farm, known as Stoneacre, in Carlisle, Pennsylvania. While in Carlisle he joined Kiwanis and the Knights of Pythias.

### Lafayette College – Scouting – Alpha Phi Omega –

In the summer of 1922 Frank moved to Columbus, Ohio. This information was gleaned from Masonic records showing his change from Norwalk, Connecticut to affiliation in the East Gate Lodge #603 in Galena, a suburb of Columbus, Ohio. In the ensuing years he received the 32nd degree Prince of the Royal Secret (Scottish Rite) Masonic Order from the Ordo ab Chao Supreme Council 33rd Jurisdiction at Grand East, in Boston, Massachusetts. Masonic Orders were a continuing vital

part of Frank Reed Horton's life. Later Frank would resign from Valley of Scranton Masonic Lodge, March 8, 1926, to enter the Valley of Allentown Masonic Lodge on June 3, 1927, while still maintaining his ties to the Blue Lodge at East Gate #603 in Ohio.

In the fall of 1923 Frank enrolled at Lafayette College as a sophomore. That year his course of studies included history, English, psychology, ethics and religion. He was 27 years old. In November of 1923 Frank attended the American Legion Armistice Ball held at the Easton armory, where he met another naval veteran, 10 years his senior, Herbert George Horton, who had served as a lieutenant on a destroyer. In sharing military stories and discussing the events of the day Herb, then Easton Area Council Scout Executive, told Frank about Scouting and launched Frank on his first Scouting assignment as Deputy Scout Commissioner for South Side District and as interim

Scoutmaster for a Scout Troop. Later Frank would state, "In the Scout Oath and Law, I found the standard I had been seeking, a standard of manhood that would stand the test of time, and it was worldwide for friendship, understanding and world peace."

The events of Frank Reed Horton's life throughout this time period, his family life, religious faith, study of law, military experience, membership in Masonry and newly found ideals of Scouting allowed him to have the energy, conviction, dedication and vision to provide the leadership necessary for the next stage. Frank Reed Horton had the conviction, dedication and vision to lead a group of 14 fellow students who worked creatively and diligently to lay the foundation and structure our Fraternity — Alpha Phi Omega.

# Membership Fulfilling a Need

by Maggie Katz, National Membership & Extension Director

The school year is in full swing and the National Convention is on the horizon. The fall pledge class is close to activation and you are planning for the winter rush. Here are a few things to think about regarding recruitment.

In order to have people to lead, be friends and do service, we need new members. While I've never been a proponent of the theory that bigger is automatically better, you do need people to have a chapter. And, we need chapters to have a fraternity.

The most important selling point to a potential member is the chapter. I know that sounds like circular logic but bear with me for a moment. Lofty principles are great

and I believe ours are the loftiest. But people join organizations to fulfill the human need to belong. People join an organization like Alpha Phi Omega because they want to belong to something important.

So, what does this mean to you and your recruitment program? First, make the chapter something to which people want to belong. Show that you care for fellow chapter members. Dwell on what you have in common — a commitment to service, a desire to lead — not on what makes us different. Be open and inviting to newcomers.

Second, make sure your chapter is doing important things. Look at your service program — are you

making a positive difference on your campus and in your community? How about leadership? Are you helping members learn valuable skills that will help them throughout their personal and professional lives?

Alpha Phi Omega members are odd ducks. We take people who barely know each other and call them Brothers. The really cool part is that if you believe that I am your Brother and I believe that you are my Brother, then we are family. I believe and I hope you do too.

Let's go forth and multiply and give others the chance to be part of our APO family. I hope to meet each of you in Philly!

## Pledge Class of 2015!



This past year Mu Eta Chapter, Albright College, Reading, Pennsylvania, held fund-raising drives to purchase playground equipment for the Albright campus child care facility. Members could not wait to set up the equipment for the children and then share a moment of photographic delight.

# The Good, The Bad, The Ugly and The Beautiful – A Fiscal Review

By Bobby M. Hainline, National Finance & Operations Director

The Annual Financial Statement for the fiscal year ending August 31, 2000, is presented for your review. The financial information and charts shown provide an overview of the Fraternity's allocation of revenues and expenses, and how they are dispersed in support of our National programs and service to our members.

Complete financial statements and the Report of Independent Certified Public Accountants prepared by our auditors, Grant Thornton, LLP, may be found on file at the National Office.

## THE GOOD

After successfully exceeding our goal for the Challenge Fund (\$200,000 / 3 years), we embarked on the road to enhance growth in our leadership programs. This new effort was the result of a challenge grant from a Brother. Our goal was set at \$150,000 for three years of pledges from our donors. (clang the cymbals, beat the drums, blare horns here) Our first year of collecting for this fund resulted in over \$60,000 of donations...far exceeding our annual budget.

Our Development Fund (Torchbearers) also exceeded its projected year-end budget. This was extremely positive since a portion of all Torchbearer and Silver Torchbearer donations were allocated to the 75th Anniversary revenue line.

Our National Office staff also needs to be commended for the prudent and efficient handling of the cost saving measures we implemented in January when the possibility of a monumental deficit was identified. Which brings me to:

## THE BAD

As reported previously, voting Delegates to the 1998 National Convention recommended that the National Board establish aggressive growth goals for membership. The Board accepted the Convention's recommendations and approved budget projections based on the proposed membership growth. These projections proved to be too high, however, which contributed significantly to a

revenue deficit of almost \$90,000. This deficit was across all three membership categories: new Pledges, new Actives, and Annual Active Membership Dues (AAMD).

Another area that severely dampened our operational revenues was our merchandise sales, failing to meet our projected budget by almost \$30,000. The two previous years were banner years for merchandise and with the 75th Anniversary approaching, and the introduction of our e-commerce site, we projected another great year — apparently we "stretched" too far.

## THE UGLY

To the point...we had an ugly year. We finished the year with an operating budget deficit of \$63,374. This represents approximately 9.5% of our annual operating budget. If it had not been for our fund-raising and realized/unrealized gains we would have been much worse off.

It could happen again.

***"If you always do what you've always done;  
You'll always get what you've always got."***

In the Fall 2000 *Torch & Trefoil*, President McKenzie challenged each of us to adopt an "attitude of growth" for the health and well being of Alpha Phi Omega.

If I were to put my analyst hat on and look at our last year, I could identify several areas that contributed to our failure to make budget. Specifically, while the majority of our Chapters fulfilled their reporting and financial obligations, it is alarming to note that:

- 1) 16 percent of our active Chapters did not report new Pledges last year.
  - 2) 20 percent of our active Chapters did not report new Actives last year.
  - 3) 11 percent of our active Chapters did not submit any Annual Active Membership Dues (AAMD) last year.
- Let's build on that non-reporting:
- If those chapters that did not report

any pledges last year had reported (using the average new Pledges per Chapter figure) we would have made budget.

- If those Chapters that did not report any new Actives last year had reported (using the average new Actives per Chapter figure) we would have made budget.

- If those Chapters that did not report AAMD last year had reported (using the average AAMD per Chapter figure) we would have made budget.

## THE BEAUTIFUL

As we celebrate our 75th Anniversary and a new millennium, Alpha Phi Omega is poised to leap into a new dimension.

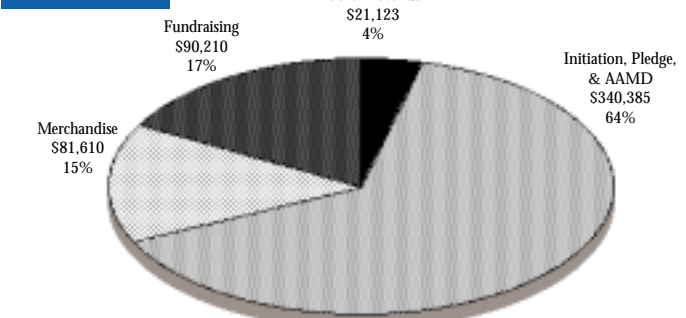
This past year has introduced new fund-raising initiatives to bolster our operating budget.

We have initiated agreements with our Endowment Trust to manage our larger donor programs to endow our scholarship, youth grant, and office maintenance programs. We distributed twenty \$500 scholarships to Alpha Phi Omega Brothers this past year. We distributed over \$5,000 in Youth Service Grants to Chapters to aid in their Service Programs. We have enhanced our planned giving programs (the Blue & Gold Society, formerly known as the Codicil Club). We have experienced successful growth of our monetary contributions to the Leadership Fund and surpassed our first year projections. As you read earlier, we have been given an exceptional gift to enhance our leadership program as well. During our upcoming Convention, you will learn of a matching gift program to be sponsored by one of our Alumni. We have received donations to the National Office for commercial purchases. We are investigating hiring a full time fund-raiser. We are approaching the 20,000th Life Member. We are approaching the 300,000th member of APO. It's A GREAT TIME to be a member in ALPHA PHI OMEGA!

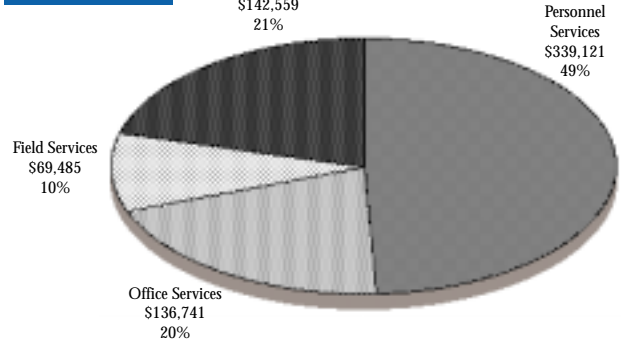
# Annual Financial Statement and Review

	2000	1999	Year to date Current	2000 Budget	2000 Over (Under) Budget	1999 Actual
<b>ASSETS</b>						
<b>Current Assets</b>						
Cash & Interest Bearing Deposits	426,006	143,120				
Accounts Receivable	10,309	19,394				
Merchandise for Sale	53,426	58,047				
Printed Materials	31,255	46,060				
Prepaid Expenses	3,621	3,213				
<b>Total Current Assets</b>	<b>524,617</b>	<b>269,834</b>				
<b>Investments</b>						
<b>Property &amp; Equipment</b>						
Land	93,000	93,000				
Building and Improvements	245,613	244,278				
Equipment	72,713	71,849				
Furniture & Fixtures	30,084	29,243				
	441,410	438,370				
Less Accumulated Depreciation	195,984	168,111				
<b>Total Property &amp; Equipment</b>	<b>245,426</b>	<b>270,259</b>				
	<b>1,219,281</b>	<b>1,162,679</b>				
<b>LIABILITIES &amp; NET ASSETS</b>						
<b>Current Liabilities</b>						
Accounts Payable-Chapters	7,464	5,548				
Accounts Payable-Vendors	12,299	8,839				
Accrued Expenses	22,910	13,364				
Due to Endowment	2,045	1,283				
	<b>44,718</b>	<b>29,034</b>				
<b>Funds Held for Chapters</b>	<b>6,221</b>	<b>4,255</b>				
<b>Net Assets</b>						
Unrestricted	387,460	450,833				
Temporarily Restricted	89,125	93,286				
Permanently Restricted	691,757	585,271				
<b>Total Net Assets</b>	<b>1,168,342</b>	<b>1,129,390</b>				
	<b>1,219,281</b>	<b>1,162,679</b>				
<b>REVENUES</b>						
Pledge Fees	79,010	99,600			(20,590)	95,040
Initiation Fees	158,235	210,675			(52,440)	200,685
AAMD	103,140	119,724			(16,584)	110,160
<b>Subtotal</b>	<b>340,385</b>	<b>429,999</b>			<b>(89,614)</b>	<b>405,885</b>
Sale of Merchandise	81,610	110,001			(28,391)	118,200
Development Fund	90,210	78,750			11,460	76,144
Fund Raising	15,918	25,000			(9,082)	22,651
Other Revenue	21,123	20,500			623	21,180
<b>Subtotal</b>	<b>208,861</b>	<b>234,251</b>			<b>(25,390)</b>	<b>238,175</b>
National Convention	-	0			0	123,425
<b>TOTAL REVENUE</b>	<b>549,246</b>	<b>664,250</b>			<b>(115,004)</b>	<b>767,484</b>
<b>EXPENSES</b>						
<b>Personnel Services</b>						
Salaries & Health Ins	316,154	306,312			9,842	290,637
Payroll Taxes	22,967	23,112			(145)	21,235
<b>Total Personnel Services</b>	<b>339,121</b>	<b>329,424</b>			<b>9,697</b>	<b>311,872</b>
<b>Office Services</b>						
Data Processing	4,848	7,000			(2,152)	7,039
Printing	32,850	45,000			(12,150)	51,818
Telephone	11,828	11,300			528	12,105
E-mail/Internet	4,831	13,400			(8,569)	12,159
Postage	37,631	35,000			2,631	34,831
Office Supplies	7,081	10,000			(2,919)	10,726
Audit	6,200	6,200			0	6,000
Equip & Maint	5,940	5,400			540	7,121
Copier	11,739	12,000			(261)	8,782
Insurance	4,747	4,500			247	4,502
Building Utilities	1,969	5,000			(3,031)	4,454
Building Maintenance	4,483	8,000			(3,517)	10,773
Bank Services	2,594	2,500			94	3,288
<b>Total Office Services</b>	<b>136,741</b>	<b>165,300</b>			<b>(28,559)</b>	<b>173,599</b>
<b>Field Services</b>						
Staff Travel	6,594	7,000			(406)	7,872
Torch & Trefoil	40,946	36,000			4,946	36,316
Cert & Awards	9,395	4,525			4,870	6,769
Alumni Services	1,958	5,000			(3,042)	5,746
Leadership Development	6,750	5,000			1,750	5,537
Pres. Discr. Fund	-	2,000			(2,000)	0
Board Meeting	1,827	3,000			(1,173)	3,373
Public Relations/Advertising	-	500			(500)	0
Scouting	478	1,500			(1,022)	950
Service	1,537	1,890			(353)	1,038
<b>Total Field Services</b>	<b>69,485</b>	<b>66,415</b>			<b>3,070</b>	<b>67,600</b>
<b>Other Services</b>						
Merchandise sales	32,409	48,400			(15,991)	50,791
Prof Fees & Subs	2,990	1,500			1,490	1,650
Depreciation	27,873	29,061			(1,188)	30,692
Miscellaneous	1,574	1,000			574	2,474
Life Member Campaign	4,448	4,500			(52)	4,458
Staff Development	1,698	2,000			(302)	1,033
Development Campaign	11,123	9,500			1,623	9,757
Fund Raising	3,793	25,000			(21,207)	11,765
75th Anniv/Blue & Gold	31,035	12,900			18,135	8,767
Special Designated Services	25,616	25,000			616	17,974
<b>Total Other Services</b>	<b>142,559</b>	<b>158,861</b>			<b>(16,302)</b>	<b>139,361</b>
<b>National Convention</b>	<b>0</b>	<b>0</b>			<b>0</b>	<b>109,562</b>
<b>Total Expenses</b>	<b>687,906</b>	<b>720,000</b>			<b>(32,094)</b>	<b>801,993</b>
<b>Net Excess (Deficit) of Operating</b>						
<b>Revenues Over Expenses</b>	<b>(138,660)</b>	<b>(55,750)</b>			<b>(82,910)</b>	<b>(34,509)</b>
<b>Unrealized Gains (Losses)</b>	<b>38,208</b>	<b>20,000</b>			<b>18,208</b>	<b>29,890</b>
	<b>(100,452)</b>	<b>(35,750)</b>			<b>(64,702)</b>	<b>(4,619)</b>
<b>Restricted Gifts</b>						
<b>Challenge Fund</b>	<b>-</b>	<b>0</b>			<b>0</b>	<b>16,134</b>
<b>Donor Designated Gifts</b>	<b>139,405</b>	<b>60,500</b>			<b>78,905</b>	<b>103,246</b>
<b>Total Restricted Gifts</b>	<b>139,405</b>	<b>60,500</b>			<b>78,905</b>	<b>119,380</b>
<b>Excess (Deficiency) Including Restricted</b>						
<b>FUND BALANCE, BEG OF YR</b>	<b>1,129,390</b>					<b>1,014,629</b>
<b>FUND BALANCE, END OF YR</b>	<b>1,168,343</b>					<b>1,129,390</b>

## INCOME



## EXPENSES



## New Information for Alumni

Welcome to the new Alumni Light pages in the *Torch & Trefoil*. In an effort to expand communication to alumni, the National Alumni/Volunteer Development Committee has recommended that the information previously published in the Alumni Light will now be included in a dedicated section of the *T&T*.

National Alumni/Volunteer Development Committee chairman, Dan Rauch explained that the Alumni Light had received good reviews. Besides articles of general interest, it was the main source of information about what Alumni Brothers were doing, the events of local alumni associations and upcoming chapter anniversary celebrations. Unfortunately, this quarterly publication was received by about 350 alumni who had paid to become Sustaining Members of the National Alumni Association and approximately 1,500 recently graduated alumni for whom chapters had provided addresses.

By publishing the Alumni Light inside the *T&T*, more than 15,000 Life Members, most of whom are alumni, will now receive the information. This includes the many Sustaining Members of the National Alumni Association who are also Life Members of the Fraternity.

In addition, the Alumni Light pages will be reproduced and will continue to be mailed to recently graduated seniors with an invitation to become Life Members.

Since all of the other benefits that were available to Sustaining Members of the National Alumni Association were already available to all alumni, the National Board of Directors has decided to cease collecting Sustaining Membership fees. This change will also reduce the confusion regarding the difference between Sustaining Membership fees and Life Membership fees.

A portion of each Alumni Light section of the *T&T* will include news about Alumni Brothers such as:

- *New jobs*
- *Marriages*
- *Involvement in other volunteer organizations*
- *Birth of children*
- *Promotions*

Local alumni associations will also be given the opportunity to publicize upcoming events or to submit summaries and pictures of recent activities.

Chapters that wish to announce upcoming anniversary celebrations or other alumni events should submit them 5-6 months prior to the date.

Information for inclusion in the Alumni Light should be sent by mail to Roxanne Beck in the National Office or by email to [alumni.publication@apo.org](mailto:alumni.publication@apo.org).

## Convention Plans for Alumni Near and Far

Several hundred alumni have already made their plans to attend the 75th anniversary convention this December in Philadelphia. Many of them took advantage of the online registration option that is now available through the Fraternity website at [www.apo.org](http://www.apo.org). However that is not the only new feature at this year's convention both for brothers attending and for those who can not make the trek to Philadelphia.

Because of the large number of Alumni who live in the New York to Washington metro area, the Convention Committee has planned a concentration of Alumni related events for the final two days of the convention (Friday the 29th and Saturday the 30th).

Although the final details were not available at the time of this publication, the National Alumni/Volunteer Development Committee is working with the Convention Committee to establish a track of events for Alumni on these days. Several workshops concerning such topics as "Establishing a Local Alumni Association" and "Opportunities for Alumni Involvement in APO" will be scheduled around time to permit Alumni and their families to sightsee the downtown area. Topics of general interest outside of APO (such as investment planning) will also be planned. On Friday night, after the traditional Alumni Reception an off-sight Alumni dinner and social event is being planned. Of course, all brothers are encouraged to attend the final banquet on Saturday.

But if you can't make the trip to Philadelphia, the Fraternity will not leave you out in the cold. Final plans to broadcast the closing banquet over the internet are being finalized. Instructions on how to log on and what equipment you will need will be included in the Alumni area of the Fraternity website in the upcoming weeks. Alumni Associations and Chapters are encouraged to get together locally, have your own banquet and join in the night's activities.

So no matter where you are this December, I look forward to having you join us for the Convention.

## Local Alumni Association News

■ The Minnesota Metro APO Alumni Association once again helped out at the Minnesota Special Olympics. Six brothers helped the athletes get to their events and to the awards ceremonies in the track and field events. For more information about the group contact president Todd Mayer at [gamba001@umn.edu](mailto:gamba001@umn.edu).

■ As part of the reactivation effort at Gamma Psi, University of Minnesota, 230 of the 670 Gamma Psi alumni have been found and were invited to a reunion luncheon on September 16 at Eastcliff, the residence of the President of the University. For more information about this group contact Kelly Hanink at [khanink@alumni.umich.edu](mailto:khanink@alumni.umich.edu).

■ Zeta Theta (Drexel University) alumni have established their second annual fantasy football league. For more information about their service and fellowship events contact Jason Marmon at [marmonj@dtc.army.mil](mailto:marmonj@dtc.army.mil).

## Brothers In The News

■ Heather Berty and Chris Boylan (Delta Xi - Ball State University) were married July 8 and now reside in Indianapolis.

■ Alan K. Bridgewater, (Epsilon Omega, University of Mississippi) married Jennifer D. Webb on May 28 in Las Vegas. Alan is the president of the Western Europe Alumni Association.

■ Former National Service Chair, mrn Tomusiak (Alpha Chi - MIT) and Denis Hickey (Omicron Iota - Worcester Polytechnic) announce the birth of their son, Benjamin Alexander, on June 17.

■ Section 99 Chair Jen O'Reardon was married on October 14 to David Meehan. The couple is living in Mendham, New Jersey.

■ Brother Charlie Zimmerman rode his bicycle 490 miles across the state of Iowa as part of an event known as RAGBRAI, the (Des Moines) Register's Annual Great Bike Ride Across Iowa —pronounced "rag-bry". The seven-day event included about 10,000 other bike riders. Charlie dedicated the 75 mile ride on July 26 to Alpha Phi Omega and the 75 for the 75th Project by collecting pledges for each mile biked that day.

■ The Brothers of Alpha Delta Phi (Seton Hall University) held a memorial service for one of their founding Brothers, Sohayla Massachi, on May 21, 2000. Over 50 Brothers from several Chapters shared their memories of Sohayla, who had graduated just the week before. The Chapter is trying to establish a scholarship in her memory. For further information contact [AReinaSHU@aol.com](mailto:AReinaSHU@aol.com).

# WHO, what, WHEN & Where?

## ALPHA PHI OMEGA'S CALENDAR OF EVENTS

### DECEMBER 16

Happy Birthday!  
We are "75"!



### DECEMBER 27-30

National Convention  
Philadelphia, PA



2001

### FEBRUARY 15-17

Section 69 Conference  
Host: Alpha Delta Pi Chapter  
University of West Alabama  
Livingston, AL

### FEBRUARY 16-18

Section 23/27 Conference  
Host: Alpha Lambda Chapter  
North Dakota State University  
Fargo, ND

### FEBRUARY 17

Section 83 Conference  
Host: Alpha Beta Omega Chapter  
Old Dominion University  
Norfolk, VA

### FEBRUARY 22-24

Section 72 Conference  
Host: Beta Zeta Chapter  
University of Georgia  
Athens, GA

Section 40 Conference  
Host: Nu Nu Chapter  
Eastern New Mexico University  
Portales, NM

### FEBRUARY 23-24

Section 21 Conference  
Host: Lambda Kappa Chapter  
Loras College  
Dubuque, IA

### FEBRUARY 24

Section 80 Conference  
Host: Rho Chapter  
University of North Carolina  
Chapel Hill, NC

### MARCH

Section 1 Conference  
Host: Alpha Delta Theta Chapter  
University of California  
Riverside, CA

Section 26 Conference  
Host: Alpha Sigma Chapter  
University of Nebraska  
Lincoln, NE

Section 97 Conference  
Host: Alpha Gamma Gamma  
Chapter  
CUNY/Hunter College  
New York, NY

### MARCH 2-4

Section 67 Conference  
Host: Alpha Gamma Phi Chapter  
Northern Kentucky University  
Highland Heights, KY

Section 68 Conference  
Host: Lambda Alpha Chapter  
East Tennessee State University  
Johnson City, TN

### MARCH 3

Section 4 Conference  
Host: Gamma Gamma Chapter  
University of California  
Berkeley, CA

### MARCH 22-23

Section 70 Conference  
Host: Theta Mu Chapter  
Vanderbilt University  
Nashville, TN

**moving?**

**new address**

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

ZIP \_\_\_\_\_

MAIL TO: Alpha Phi Omega  
14901 E. 42nd Street • Independence, MO 64055

**Alpha Phi Omega**  
14901 E. 42nd Street  
Independence, MO 64055

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