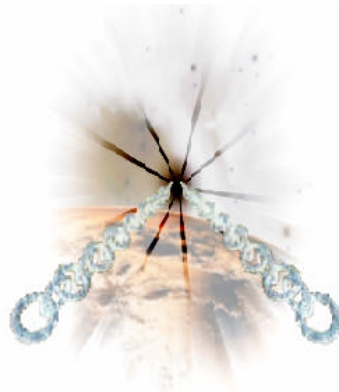


*North Carolina*  
*Phi Beta Lambda*



NC PBL YOUR LINK TO THE FUTURE

*State Chapter*  
*Annual Business Report*  
*2002-2003*

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# *Chapter Profile*

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NCPBL Delegation in Nashville, Tennessee



April 15, 2003

To Members and Advisers of North Carolina Phi Beta Lambda:

The 2002-2003 year was an extremely busy year for the NCPBL family. It has been my privilege to serve as State President for this outstanding organization. From the National Leadership Conference in Nashville, TN, to the State Leadership Conference in Charlotte, NC, I have had the opportunity to serve dedicated members who have a vision and mission to become the effective leaders of tomorrow. I have been able to work with a dedicated group of officers who were all working for a common goal-to make our local chapters, as well as the state chapter, a success!

This year has been extremely trying for the NCPBL family, with the loss our beloved State Adviser, Mr. Terry Lowrance. He was truly devoted to this organization and its members, and I know that he was proud of every one of us. In the future, my hope is that the current members and advisers will continue to make Mr. Lowrance's dream a reality – NCPBL will remain #1 in the nation.

This year's theme, "NCPBL...Your Link to the Future," represents the strengths and success of our organization as we continue to link our reputation as being one of the strongest state chapters in the nation. We linked to the future based on a program of work that was strong in content and designed to reach new goals and challenges. But more than anything, the links of this great state chapter are and always will be the members of North Carolina Phi Beta Lambda who give time, effort, and heart to make the state chapter extremely successful. You are the reason we are so strong and you should be proud.

The State Executive Council has attempted to provide you with effective communications, memorable conferences, and challenging goals. The State Executive Council and the members who made this past year so successful are to be commended. Thank you for making the 2002-2003 year one of the most memorable in North Carolina Phi Beta Lambda's history.

This annual business report details activities of the year and serves as a reminder of what we have accomplished together. I also hope you capture the spirit of the year as you remember the projects and programs in which you were involved. Best wishes to those delegates attending the 2003 National Leadership Conference in Dallas, TX. Thank you for your confidence in me and for your support during this year. I hope that your years in Phi Beta Lambda have been as memorable and beneficial as mine.

Sincerely,

*Alison*

Alison Foster, State President 2002-2003

North Carolina Phi Beta Lambda  
**MEMBERSHIP HISTORY**

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In the spring of 1954, Dr. James L. White and several other business educators established the North Carolina Chapter of FBLA -Phi Beta Lambda, Inc. Twenty high school and college chapters were pioneers in Dr. White's dream of establishing FBLA -PBL in every business education program in the state. In 1969, the state chapter was divided into separate divisions. Today, more than 10,200 high school and middle level students are active in the FBLA division, 805 in the PBL division, and over 200 in the combined professional divisions.

The North Carolina Phi Beta Lambda state membership is currently 805 in 31 local chapters located across the state. Shown below is the statistical data illustrating North Carolina Phi Beta Lambda's membership record for the past 18 years. (See Appendix A for a list of the state's 2002-2003 active local chapters.)

<b>YEAR</b>	<b>CHAPTERS</b>	<b>MEMBERSHIP</b>
2002-03	31	805
2001-02	31	748
2000-01	34	878
1999-00	35	837
1998-99	36	814
1997-98	39	854
1996-97	36	745
1995-96	36	859
1994-95	37	847
1993-94	40	878
1992-93	41	946
1991-92	46	1,116
1990-91	45	1,344
1989-90	48	1,661
1988-89	41	1,397
1987-88	41	1,487
1986-87	39	1,191
1985-86	35	983

North Carolina has attracted dedicated leadership from its local chapter advisers to serve as State Advisers. They include

1969-1971	Ms. Joyce Cherry, Lenoir Community College
1971-1974	Mr. Albert Gaskill, Campbell University,
1974-1979	Ms. Geraldine Michael Smith, Wingate College
1979-1993	Mr. Terry C. Lowrance, Durham Technical Community College Dr. Robert N. Simmons, Lenoir-Rhyne College
1993-2003	Mr. Terry Lowrance, Durham Technical Community College

Mr. Ken Smith, State Department of Public Instruction, serves as NC FBLA -PBL State Chairman. The current structure of FBLA -PBL is consistent with that of the national organization. The establishment of the NCPBL State Professional Division has enhanced state chapter activities. Since 1976, the Professional Division officers have contributed to the successes of Phi Beta Lambda in North Carolina by serving on the State Executive Council and playing a major role in implementing the annual State Leadership Conference. (See Appendix B for 2002-2003 State Executive Council membership.) The Professional Division continues to be at the forefront of membership nationally and currently boasts 205 members representing 29 local chapters in 2002-2003. The State Chapter continues to

provide many opportunities for the college students in North Carolina as well as the eight million citizens of the state. The most important service of Phi Beta Lambda is providing future business leaders for the state of North Carolina.

# *Productivity*

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**2002 NLC Nashville, Tennessee  
Awards Presentation**



**Connecting with FBLA students**

The achievement of results based on predetermined plans of action was the major focus in the area of Productivity for the North Carolina State Chapter of Phi Beta Lambda during the 2002-2003 year. At the State Executive Council's Spring Meeting in June 2002, the state officer team developed a set of goals coinciding with the prescribed elements of Productivity.

As the year came to a close, it became apparent that the state officer team, with the support of the State Executive Council members and local chapter members, accomplished the majority of its goals --the mission of any business organization whether it be for profit or not-for-profit.

The Productivity section of the 2002-2003 North Carolina Phi Beta Lambda State Chapter Annual Business Report focused on achievement of the following goals. The results achieved, as well as a description of other related accomplishments, are highlighted for each goal.

## **I. RECRUITMENT OF MEMBERS AND CHAPTERS**

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Effective state and national programs depend on membership support and growth at the local level. Increased local chapter membership provides resources for the expansion of state chapter and national association activities. Through membership recruitment activities, valuable experiences are gained in public relations and leadership. Establishing a new chapter or reactivating an inactive chapter takes planning, communication, and persistence. Organizing new chapters offers more students the opportunity to become prepared for careers in business and creates stronger state and national organizations, thus providing better service to all members.

**Goal A**-To encourage the development of local chapter membership by providing a packet of membership recruitment and involvement tools that can be used and/or adapted by local chapters.

***RESULTS ACHIEVED**—In September 2002, State Adviser Terry Lowrance prepared and mailed to each local chapter a Chapter Information Guide to kick off the 2002-2003 year. The packet included a variety of items that could be used and/or adapted by local chapters for the purpose of membership recruitment. In addition, the regional vice presidents and local chapter advisers emphasized the contents of this packet during sessions conducted at each Regional Kick-Off meeting on September 19.*

**Goal B**—To sponsor a “President’s Award” at the Fall Leadership Development Conference for the best theme-related PBL display of membership recruitment techniques used by local chapters. The State Chapter President, the Professional Division President, and the host Regional Vice President will judge the event.

***RESULTS ACHIEVED**—At the North Carolina Fall Leadership Development Conference on October 25-26, local chapters set up recruitment displays with the theme, “NCPBL... Your Link to the Future,” and were judged on creativity and professionalism by State Chapter President Alison Foster, Professional Division President Michael Coffey, and host Regional Vice President Jim Daniels. Beaufort County Community College received a plaque for the best recruitment display; runners-up were Pfeiffer University and Asheville-Buncombe Technical Community College.*



**Goal C**–To recognize active chapters that receive the Membership Achievement Award from the national association for maintaining or increasing membership, with a goal of 50% of active chapters achieving this recognition.

***RESULTS ACHIEVED**–Of North Carolina’s 31 active local chapters during the 2002-2003 year, 52% maintained or increased membership as compared to the previous year. The national association will recognize 16 of North Carolina’s local chapters in June 2003 with the Membership Achievement Award. These local chapters are Appalachian State University, Asheville-Buncombe Technical Community College, Beaufort County Community College, Durham Technical Community College, Fayetteville Technical Community College, Isothermal Community College, Lenoir Community College, Mount Olive College, North Carolina Central University, Randolph Community College, St. Augustine’s College, Sampson Community College, Southeastern Community College, South Piedmont Community College, Surry Community College, and Wilkes Community College.*

**Goal D**–To have State Officers contact schools that have expressed a sincere interest in chartering/reactivating a local chapter of Phi Beta Lambda and present progress reports at the Winter Executive Council Meeting, with a goal of chartering or reactivating six chapters statewide.

***RESULTS ACHIEVED**–At the Spring Executive Council Meeting, state officers were assigned schools to contact regarding chartering or reactivating a PBL chapter. The NCPBL Marketing and Recruitment Plan of Action information packets containing nationally prepared materials and state chapter materials were provided to the schools. The newly appointed Chapter Development Director Ron Eggers met with all State Officers to develop a strategy. Each officer then contacted appropriate officials at the targeted schools either by telephone, by mail, or in person to provide compelling reasons for reactivating or chartering a chapter. The groundwork for additional chapters was established this year as evidenced by increased interest from numerous schools in the state. Blue Ridge Community College and Pfeiffer University joined the North Carolina Phi Beta Lambda family as new chapters. Craven Community College, Wake Technical Community College, and Winston-Salem State University were reactivated during the 2002-2003 year.*

**Goal E**–To inform FBLA members of PBL by having each Executive Council member attend at least one FBLA function with a goal of 15 functions attended.

***RESULTS ACHIEVED**–Members of the Executive Council offered their service to the North Carolina chapter of Future Business Leaders of America. President Alison Foster, Secretary/Treasurer Gina White, Historian Ty McLean, Central Region Vice President Ashley Hayes, and Eastern Region Vice President Jim Daniels attended FBLA meetings in their local areas, conducted workshops and seminars, inducted FBLA officers, judged events, and participated in group activities. State Committee members Debra Baker, Ron Eggers, and Teresa Parker participated in an ‘FBLA Day’ at Lenoir Community College. The participation of the State Executive Committee displayed the NCPBL commitment to linking FBLA and PBL in an educational/professional relationship.*

**Goal F**—To increase state chapter membership by 10%, with a goal of 823 members.

***RESULTS ACHIEVED**—The state officer team worked extremely hard this year in an effort to increase the state chapter membership by 10%. State membership reached 805 members for the 2002-2003 year—a 7.6% increase—making North Carolina the third largest state chapter in the nation. Membership recruitment efforts included the “President’s Award” at Fall Leadership Development Conference, sessions at Regional Kick-Off meetings and Regional Tip-Off workshops, the Marketing and Recruitment Plan of Action packets, and the efforts of Chapter Development Director Ron Eggers.*

**Goal G**—To recognize, at the 2003 State Leadership Conference, those chapters that charter/reactivate new chapters.

***RESULTS ACHIEVED**—The following schools were recognized for chartering/reactivating chapters: Asheville-Buncombe Technical Community College (Blue Ridge Community College), Beaufort County Community College (Craven Community College), Durham Technical Community College (Wake Technical Community College), North Carolina Central University (Winston-Salem State University), and Stanly Community College (Pfeiffer University).*

**Goal H**—To recognize, at the 2003 State Leadership Conference, those chapters that increase membership by 10%.

***RESULTS ACHIEVED**—Fifteen chapters (48%) increased membership by 10%. Those chapters were Appalachian State University, Asheville-Buncombe Technical Community College, Beaufort County Community College, Durham Technical Community College, Fayetteville Technical Community College, Isothermal Community College, Lenoir Community College, Mount. Olive College, North Carolina Central University, Randolph Community College, Sampson Community College, South Piedmont Community College, Southeastern Community College, Surry Community College, and Wilkes Community College.*

**Goal I**—To recognize local chapter members who receive the Membership Madness Award from the national association, with a statewide goal of 10 recipients.

***RESULTS ACHIEVED**—This national program recognizes members who extend the benefits of membership to at least five friends. Eleven North Carolina Phi Beta Lambda members will receive certificates: Terri Collins, Ashley Hayes, Amanda Douglas from Surry Community College; Tracy Robinson from North Carolina Central University; Jessica Keith, Todd Bailey, Kadie Hagan, Alison Foster from Barton College; Terri Watson from Stanly Community College; and William Toler and Crystal Adair from Craven Community College.*

**Goal J**—To staff an information/recruitment booth at the 2003 North Carolina FBLA State Leadership Conference.

***RESULTS ACHIEVED**—North Carolina State Officers, Regional Advisers, and the FBLA State Adviser were contacted to offer assistance during the competitive events and to seek the opportunity to set up an information/recruitment booth at the 2003 FBLA State Leadership Conference. North Carolina Phi Beta Lambda assistance and the request for the booth were both declined.*

## II. STATE OFFICER ASSISTANCE TO LOCAL CHAPTERS

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State officers are elected each year to serve the state chapter by setting and achieving goals, encouraging membership growth, and serving on the State Executive Council. The success of a state chapter depends upon the strength of its officers and their ability to interact with the local chapters they serve.

The success of a Phi Beta Lambda chapter depends on many variables--one of the most important is the chapter adviser. An adviser of a college-level professional organization has many responsibilities including assisting students in developing competent, aggressive business leadership skills. Local Phi Beta Lambda chapter activities are an integral part of each institution's instructional program. Advisers are rewarded for their efforts through the accomplishments and successes of chapter members.

Thus, it is imperative for the success of a state chapter to provide proper assistance to members, officers, and advisers of each local chapter.

**Goal A**—To convene four meetings of the State Executive Council to conduct the business and facilitate the program of work of the state chapter.

***RESULTS ACHIEVED**—During the 2002-2003 year, North Carolina Phi Beta Lambda held four meetings of the State Executive Council. The first meeting (for outgoing and incoming state officers) was held Sunday, April 14, 2002, at the close of the 2002 State Leadership Conference. The agenda addressed the transition between the two teams.*

*The second meeting, held June 7-9, 2002, at Asheville-Buncombe Technical Community College, consisted of an officer training session, a discussion of marketing tactics for NCPBL, the establishment of goals for the 2002-2003 year, and a business meeting that focused on strategies to accomplish the program of work. This meeting gave officers and members of the Executive Council an opportunity to bond and form relationships needed to ensure success throughout the year.*

*The third meeting was held August 12-14, 2002, in Greensboro, NC. The primary agenda items included arrangements for the Regional Fall Kick-Off meetings and the Fall Leadership Development Conference. The fourth meeting, January 31-February 1, 2003, was held in Burlington, NC, and focused on the final arrangements for the Regional Winter Tip-Off workshops and the 2003 State Leadership Conference.*

**Goal B**—To provide local chapter representatives with a chronological schedule of activities, meetings, and conferences for the year.

***RESULTS ACHIEVED**—A chronological schedule of events, deadlines, and special observances was distributed in the Chapter Information Guide at each Regional Fall Kick-Off meeting and at the 2002 Fall Leadership Development Conference. The schedule was also printed in the state handbook and state newsletter, and was posted on the state website.*

**Goal C**– To provide information at the Regional Fall Kick-Off meetings and the Regional Winter Tip-Off workshops and devote a page in the fall issue of the state newsletter encouraging students to pursue state officer positions.

***RESULTS ACHIEVED**–Candidates for state offices were strongly recruited this year. At each Regional Kick-Off meeting and each Regional Tip-Off workshop, chapters were encouraged to consider running a candidate for an office at the 2003 State Leadership Conference. A promotion appeared in the fall edition of the state newsletter highlighting the benefits of serving as a state officer. Testimonials from this year’s officer team touted the opportunities and experiences of being a state officer. There were five candidates for office at the 2003 State Leadership Conference. Officers elected included Todd Bailey from Barton College (President), Ally Kindel from Barton College (Secretary/Treasurer), Jenny Zarnowski from Asheville-Buncombe Technical Community College (Western Region Vice President), and Jessica Murphy from Mount Olive College (Eastern Region Vice President). The offices of Central Region Vice President and Historian are open and will be filled by appointment by the State Committee and State President prior to the Spring Executive Council meeting so that these officers and their local chapter advisers can be present for training and the establishment of state goals.*

**Goal D**–To conduct Regional Winter Tip-Off workshops in early February 2003 to provide chapter representatives with State Leadership Conference registration packets and to explore strategies for success during the conference, with the statewide goal of 75% of the active chapters attending.

***RESULTS ACHIEVED**– In each of the three regions, a Winter Tip-Off workshop was held on February 7. The Eastern Region Tip-Off was held at Johnston Community College with Barton College, Beaufort County Community College, Craven Community College, Elizabeth City State University, Fayetteville State University, Fayetteville Technical Community College, Johnston Community College, Lenoir Community College, Mount Olive College, Sampson Community College, and Wake Technical Community College in attendance. Attending the Central Region Tip-Off at Randolph Community College were Durham Technical Community College, Pfeiffer University, Randolph Community College, South Piedmont Community College, Stanly Community College, Surry Community College, and Winston-Salem State University. The Western Region Tip-Off was held at Isothermal Community College with Appalachian State University, Asheville-Buncombe Technical Community College, Blue Ridge Community College, Isothermal Community College, Lenoir-Rhyne College, and Mitchell Community College in attendance. Total chapter attendance statewide was 81%. The Regional Tip-Off workshops consisted of four sessions covering conference preparation, Blue Ribbon Award requirements, state officer candidate recruitment, and professional division benefits.*

**Goal E**– To visit with every active local chapter prior to the Winter Executive Council Meeting to offer guidance and seek feedback.

***RESULTS ACHIEVED**–Regional Vice Presidents were encouraged to contact (in person, by telephone, or by email) each chapter in his or her region and encourage member participation in the Regional Tip-Off workshops. Also, bimonthly, State President Alison Foster sent Presidential Newsbriefs to all chapters. Regional Vice Presidents Jim Daniels and Ashley Hayes also sent bimonthly Newsbriefs to all chapters in their region.*

### III. PREPARATION OF LOCAL AND STATE OFFICERS FOR THEIR DUTIES

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It is important for the growth of a state chapter to have a well-qualified and dependable group of officers. With capable officers, the business of the chapter can be conducted using proper parliamentary procedures, an effective program of work can be initiated involving all members, minutes can be recorded and kept up-to-date and complete, effective marketing can be generated, and local chapter members, as well as state officers, can grow professionally.

**Goal A**–To provide an extensive orientation program for the State Officer Team at the Spring Executive Council Meeting to educate the officers for their specific duties, develop goals, and establish a plan of action to accomplish the program of work.

***RESULTS ACHIEVED**–At the June 7-9, 2002, meeting of the State Executive Council, an extensive three-day orientation and planning session was held for the new state officers and their advisers. Session topics included functional areas and roles of the state association, written and oral communications, parliamentary procedures, budgets and financial affairs, conferences and meetings, officer task training, leadership characteristics, goals development, and business etiquette.*

**Goal B**–To encourage state officers and local chapter officers to attend the Institute For Leaders at the National Leadership Conference in Nashville, TN, June 22-23, 2002.

***RESULTS ACHIEVED**–Effective leadership training is essential for the survival of both the state chapter and local chapters. State and local chapter officers, members, and advisers were encouraged to attend the Institute For Leaders at the National Leadership Conference. State officers are budgeted \$300 as an incentive for attendance at this national program. Three delegates from the North Carolina chapter attended the Institute For Leaders at the 2002 National Leadership Conference.*

**Goal C**–To sponsor Regional Fall Kick-Off meetings for local chapter officers and advisers in each of the three NCPBL regions to prepare local chapter leaders for the year’s activities and to exchange ideas, with the statewide goal of 75% of the active chapters attending.

***RESULTS ACHIEVED**–In each of the three regions, a Regional Fall Kick-Off meeting was held on September 19. The Eastern Region Kick-Off was held at Beaufort County Community College with Barton College, Beaufort County Community College, Fayetteville State University, Halifax Community College, Johnston Community College, Lenoir Community College, and Mount Olive College attending. Craven Community College was a special guest. Forty-five delegates were present. Host of the Western Region Kick-Off meeting was Asheville-Buncombe Technical Community College. Chapters attending were Asheville-Buncombe Technical Community College, Blue Ridge Community College, Lenoir-Rhyne College, and Southwestern Community College. Twenty delegates attended. Randolph Community College was host to the Central Region Kick-Off meeting. Attending were Durham Technical Community College, Livingstone College, North Carolina Central University, Pfeiffer University, Randolph Community College, South Piedmont Community College, Stanly Community College, and Surry Community College. Thirty-five delegates attended. Total attendance for the state was 65% of active local chapters. The Regional Kick-Off meetings consisted of four sessions that introduced ideas for membership recruitment, project development, conference participation, and publicity. A trivia contest and question-and-answer period with the state officers provided an opportunity for local chapter officers to network.*

**Goal D**—To revise the State Handbook (as needed) and provide each active local chapter with the 2002-2003 version in electronic media form by September 1, 2002.

***RESULTS ACHIEVED**—Revisions of the State Handbook were submitted to Publications Director Debra Baker for consideration; the revised handbook was distributed to each local chapter in electronic media and posted on the state chapter website on October 1. Information on changes was highlighted at the Regional Fall Kick-Off meetings and in the adviser workshop during the 2002 Fall Leadership Development Conference.*

**Goal E**—To provide local officer training workshops at the 2002 Fall Leadership Development Conference.

***RESULTS ACHIEVED**—At the 2002 Fall Leadership Development Conference state officers conducted sessions for their counterparts at the local chapter level. These sessions focused on the duties and responsibilities of the offices and provided local officers with tips and information to be used when conducting the business of the local chapters, recruiting members, and planning chapter projects.*

**Goal F**—To encourage local chapter advisers to disseminate copies of the appropriate sections of the State Handbook to all chapter officers.

***RESULTS ACHIEVED**—In electronic media format and with the State Handbook posted on the state website, all sections are easily accessible to all chapter members.*

**Goal G**—To encourage local chapter advisers to conduct orientation programs for local chapter officers.

***RESULTS ACHIEVED**—The Chapter Management Packet, State Handbook, and National Management Handbook provide many suggestions for orientation sessions for local chapter officers. North Carolina Regional Kick-Off Meetings provide literature that could be used by local chapter advisers to acclimate local chapter officers to Phi Beta Lambda goals.*

#### **IV. COOPERATION WITH BUSINESS, PROFESSIONAL, AND SERVICE GROUPS WITHIN THE COMMUNITY**

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Activities encouraging interaction with North Carolina business, professional, and service organizations are a vital part of the learning process. Chapter members are encouraged to participate in activities designed to facilitate intelligent career choices, develop business skills, learn the value of community responsibility, and become well-rounded individuals. Because our organization emphasizes the business training that members can derive from associating with various groups, Phi Beta Lambda members owe it to themselves to gain as much knowledge as they can through cooperation with business, professional, and service groups throughout our state.

**Goal A**—To encourage active local chapters, through presentations and publicity, to sponsor a service project within their local community, as evidenced by a 20% increase in the number of entries in the Community Service Project event.

***RESULTS ACHIEVED**—Through workshops offered during the Regional Kick-Off meetings, the 2002 Fall Leadership Development Conference, the Regional Tip-Off workshops, articles in the state newsletter, and credit as a Blue Ribbon and Gold Seal option, local chapters were encouraged to serve their local communities by conducting projects and to further evidence their service by entering a report in the Community Service Project event for judging at the 2003 State Leadership Conference. Eight entries (as compared to five entries in 2002) were submitted for the Community Service Project event—Asheville-Buncombe Technical Community College, Barton College (two entries), Blue Ridge Community College, Fayetteville Technical Community College, Nash Community College, North Carolina Central University, and Surry Community College. This represents a 60% increase in local chapter participation.*

**Goal B**—To encourage active local chapters, through presentations and publicity, to increase dialogue and interaction with local business leaders, as evidenced by a 20% increase in the number of entries in the Partnership with Business Project event.

***RESULTS ACHIEVED**—Workshops at the Regional Kick-Off meetings, the 2002 Fall Leadership Development Conference, the Regional Tip-Off workshops, articles in the state newsletter, and credit as a Blue Ribbon and Gold Seal option demonstrated to local chapters the benefits derived by forming partnerships with local businesses as a means of increasing dialogue and interaction. Emphasis was placed on using the Partnership with Business Project as a formal structure for this interaction and to evidence the interaction with a report entry in the Partnership with Business Project event at the 2003 State Leadership Conference. This year there were four entries (as compared to five in 2002) in the Partnership with Business Project event—Asheville-Buncombe Technical Community College, Barton College, Lenoir-Rhyne College, and Nash Community College. This represents a 20% decrease in local chapter participation.*

**Goal C**—To solicit business contributions and involvement in the annual State Leadership Conference through plaque and certificate sponsorships and event judging.

***RESULTS ACHIEVED**—This goal was reached as evidenced by the support from individuals, businesses, and the Professional Division. Glencoe/McGraw-Hill, Inc. and its representative, Mr. Tony Hodge, sponsored a breakfast for Advisers and Professional Division members at the 2003 State Leadership Conference. Concord Printing, Inc. assisted in the printing of conference programs. Concord Specialty Products, Inc. defrayed cost of ribbons for conference attendees. The North Carolina Phi Beta Lambda Foundation, Inc., and The North Carolina Phi Beta Lambda Professional Division sponsored an Advisers and Professional Division Appreciation Reception. Over 20 Professional Division members volunteered as judges at the 2003 State Leadership Conference.*

*As a result of the endeavor of Chapter Development Director Ron Eggers, five competitive events received sponsorship for a three-year period. The Accounting for Professionals event is sponsored by Anthony and Robinson, CPA, PA, Charlotte, NC; Business Decision Making is sponsored by Big D Stables, Oxford, NC; Business Plan (including a \$500 stipend to the First Place Winner) is sponsored by North Carolina REAL Enterprises, Inc., Durham, NC; Future Business Executive is sponsored by Carriage on the Park, Charlotte, NC; and Management is sponsored by Carolina Forge Company, Wilson, NC.*

**Goal D**—To encourage and support NCPBL Professional Division growth, development, and involvement by each state officer recruiting an average of five new Professional Division members, for a total of 30.

***RESULTS ACHIEVED**—Professional Division membership continues to be a priority of the North Carolina State Chapter of Phi Beta Lambda. State Professional Division Director Robbie McDonald and officers of the State Professional Division are voting members of the NCPBL State Executive Council. (See Appendix B for 2002-2003 State Executive Council membership.) Professional Division membership in North Carolina reached 205 during 2002-2003 with 29 local chapters represented. Nationally, North Carolina has boasted the largest Professional Division for ten out of the last eleven years. The state officer team facilitated this growth by recruiting over 83 new Professional Division members. The following chapters received Professional Division recruitment certificates at the 2003 State Leadership Conference: Barton College, Beaufort County Community College, Blue Ridge Community College, Durham Technical Community College, Fayetteville State University, Lenoir Community College, North Carolina Central University, Southeastern Community College, and Surry Community College. The Professional Division Chapter of the Year award was presented to Barton College for recruitment of new members.*

## **V. PARTICIPATION IN PUBLIC RELATIONS ACTIVITIES; PREPARATION OF A NEWSLETTER**

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Effective publicity facilitates the entry of the state and local chapters into the business community; it can also serve as the basis for a well-rounded public relations campaign. Public relations activities help the organization sustain community support, nurture pride among members by stimulating greater efforts, maintain student interest by fostering awareness, and attract prospective members. In addition to the many uses of the finished product, the process of generating press releases and a newsletter is an invaluable learning experience.

**Goal A**—To encourage local chapters to recognize accomplished individuals in their local business community by submitting a Businessperson of the Year nominee.

***RESULTS ACHIEVED**—Businessperson of the Year awards are a means of recognizing individuals within the business community who have made significant contributions to chapters and who, because of their business successes, are deserving of recognition. This year there were three nominations for Businessperson of the Year from the active local chapters. Receiving recognition at the 2003 State Leadership Conference as Businesspersons of the Year were Ms. Donna Gilsdorf (nominated by Asheville-Buncombe Technical Community College), Mr. Ronald Hunter (nominated by North Carolina Central University), and Mr. Joel Benson (nominated by Blue Ridge Community College). Mr. Hunter and Mr. Benson will be recognized at the 2003 National Leadership Conference in June as Businesspersons of the Year from North Carolina.*



**Goal B**–To publish two issues of the state newsletter containing information on the local, state, and national levels with distribution to all state chapter members, professional members, and other supporters of the State Chapter, with the goal of 50% of all active chapters submitting articles.

***RESULTS ACHIEVED**–Ty McLean, State Historian, under the supervision of Kathy Doole, adviser, and Debra Baker, State Publications Director, published fall and spring editions of The Heartbeat of PBL, the North Carolina Phi Beta Lambda state newsletter, during the year. The newsletters were distributed at the Fall Leadership Development Conference in October and the State Leadership Conference in April. The newsletters included local chapter news, state and national information, articles promoting the state goals, conference promotions, and Professional Division information. The fall edition highlighted local chapter members' success at the 2002 State Leadership Conference, North Carolina's success at the 2002 National Leadership Conference, and American Enterprise Day. The spring edition was dedicated in memory of Terry Lowrance, North Carolina State Adviser for 24 years and his dream, The North Carolina Foundation, Inc. Twelve hundred copies of each issue were printed for distribution to NCPBL chapter members, advisers, Professional Division members, and other supporters.*

**Goal C**–To distribute Vice Presidential regional Newsbriefs electronically to each active local chapter and the State Executive Council in September, November, January, and March.

***RESULTS ACHIEVED**–During the 2002-2003 year Regional Vice Presidents (Jim Daniels, Eastern Region and Ashley Hayes, Central Region) were responsible for publishing and distributing Newsbriefs to chapters in their respective regions as well as to State Executive Council members. These Newsbriefs included regional news, important dates, and announcements.*

**Goal D**–To distribute a Presidential Newsbrief electronically to each active local chapter and the State Executive Council in August, October, February, and March.

***RESULTS ACHIEVED**–State President Alison Foster distributed the Presidential Heartbeat, a bi-monthly Newsbrief that provided deadlines for upcoming events, membership reports, and chapter news. Also included in the Presidential Heartbeat were interviews with PBL members from across the state, with a focus on why they chose to become involved with PBL and how their association with the organization had affected their outlook for the future.*

**Goal E**–To utilize state chapter brochures and the Multimedia Presentation event entries to promote Phi Beta Lambda.

***RESULTS ACHIEVED**–During the 2002-2003 year the State Chapter brochure was used as a promotional tool for the North Carolina State Chapter of Phi Beta Lambda. Copies of the state brochure were provided to local chapters for use in promoting the association to new and reactivated chapters, recruiting potential competitive events judges, and preparing local chapter brochures. An additional brochure entitled “Why You Need PBL in Your School” was redesigned. This brochure was used to promote Phi Beta Lambda to potential chapters throughout the state. Discussions are continuing on the utilization of the State Multimedia Presentation entries as promotional material for North Carolina Phi Beta Lambda.*

**Goal F**–To maintain an up-to-date state chapter website.

***RESULTS ACHIEVED**–State Publications Director Debra Baker and State Historian Ty McLean maintain the authority to ensure that the North Carolina website (<http://www.ncpbl.org>) is continuously updated to alert chapter members of timely information.*

**Goal G**–To archive the state newsletters on the NCPBL chapter website.

***RESULTS ACHIEVED**–Jim Daniels, 2001-2002 State Historian, implemented this activity as an additional venue of visibility for North Carolina Phi Beta Lambda. He also developed an archival section on the state chapter website where past state newsletter articles are posted.*

**Goal H**–To require all local chapters with a chapter website to update and maintain their local chapter website and link to the state website and encourage linkage to the national website.

***RESULTS ACHIEVED**– Chapters were instructed to use the state theme, “NCPBL... Your Link to the Future,” as a focus for their local chapter website. State Professional Division Director Robbie McDonald, State Secretary/Treasurer Gina White, and Central Region Vice President Ashley Hayes perused websites of North Carolina schools to evaluate their effectiveness. Chapters with outdated sites were removed from the state and national websites.*

**Goal I**–To publicize State Leadership Conference and National Leadership Conference winners on the state chapter website, in the state newsletter, and in the State Handbook.

***RESULTS ACHIEVED**–The event winners of the 2002 State Leadership Conference and the 2002 National Leadership Conference are displayed on the state website, in the fall edition of the state newsletter, and in the State Handbook. This list was also distributed via email to all chapters immediately following the conferences.*

**Goal J**–To encourage each local chapter to submit articles to school, local, state, or national publications, with the goal of 75% of active chapters participating.

***RESULTS ACHIEVED**–Representatives from 15 chapters donated articles to the fall state newsletter; representatives from 20 chapters donated articles to the spring newsletter. In addition, most chapters submitted articles of community service and other recognition events to their campus or community newspapers. Blue Ribbon recognition is afforded chapters that promote their activities.*

## **VI. DEVELOPMENT AND PROMOTION OF FBLA-PBL STATE PROJECTS**

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Involvement is the key element for the success of the local chapter; the same is true for the state organization. Through publications, service projects, programs, and establishment of goals, the North Carolina State Chapter encourages local chapter involvement in the activities of the state chapter. Through grassroots involvement comes the true strength of any association.

**Goal A**--To encourage each local chapter to contribute \$30 to the State Scholarship Fund and recognize each local chapter meeting this goal, with the goal of 75% of active chapters contributing.

***RESULTS ACHIEVED**--This goal was promoted through mailings from the state office, presentations during Regional Kick-Off meetings and Regional Tip-Off workshops, and contribution incentives during the State Leadership Conference. Contributions to this fund fulfilled one requirement for the Blue Ribbon Award. Two \$650 scholarship awards were presented during the 2003 State Leadership Conference. The 2003 recipients were Ullandra Canady from Beaufort County Community College and Connie Clippard from Surry Community College. These funds will be awarded at the 2003 Fall Leadership Development Conference.*

*Total contributions of \$763 were received for the NCPBL State Scholarship Fund in 2002-2003. The following chapters met or exceeded the goal (which was increased from \$25 last year) and received a certificate at the 2003 State Leadership Conference: Asheville-Buncombe Technical Community College, Barton College, Beaufort County Community College, Blue Ridge Community College, Craven Community College, Durham Technical Community College, Fayetteville State University, Isothermal Community College, Johnston Community College, Lenoir Community College, Mount Olive College, North Carolina Central University, Pfeiffer University, Sampson Community College, South Piedmont Community College, Southeastern Community College, St. Augustine's College, Stanly Community College, Surry Community College, Wilkes Community College, and Winston-Salem State University. Sixty-five percent of the local chapters contributed to the State Scholarship Fund. In addition, the following individuals/groups contributed to the State Scholarship Fund: Meredith-Leigh Craig, Allyson Moye, Jon McBride, Shawn Senter, and the NCPBL Professional Division.*

**Goal B**– To sponsor a “Blue Ribbon” program for the purpose of recognizing local chapters for goals achievement, with the goal of 60% of active local chapters achieving this recognition.

***RESULTS ACHIEVED**--Promotion for this state award was made through mailings from the state office, articles in the state newsletter, presentations at the Regional Kick-Off meetings and Regional Tip-Off workshops, and informational sessions at the Fall Leadership Development Conference. This award recognized 14 chapters (45%) for their participation in Phi Beta Lambda state and national conferences, projects, programs, and publicity/membership activities throughout the year. Chapters receiving this state award were Asheville-Buncombe Technical Community College, Barton College, Beaufort County Community College, Blue Ridge Community College, Craven Community College, Durham Technical Community College, Fayetteville Technical Community College, Isothermal Community College, Lenoir Community College, Mount Olive College, Nash Community College, South Piedmont Community College, Stanly Community College, and Surry Community College.*

**GOAL C**– To recognize local chapters that maintain or increase chapter membership with a Membership Achievement Award, with the goal of 50% of all active local chapters qualifying for this recognition.

***RESULTS ACHIEVED**– Of North Carolina’s 31 active local chapters during the 2002-2003 year, 52% maintained or increased membership as compared to the previous year. The national association will recognize 16 of North Carolina’s local chapters in July 2003 with the Membership Achievement Award. Those local chapters are Appalachian State University, Asheville-Buncombe Technical Community College, Beaufort County Community College, Durham Technical Community College, Fayetteville Technical Community College, Isothermal Community College, Lenoir Community College, Mount Olive College, North Carolina Central University, Randolph Community College, St. Augustine’s College, Sampson Community College, Southeastern Community College, South Piedmont Community College, Surry Community College, and Wilkes Community College.*

**GOAL D**– To promote and encourage all active local chapters to strive for the Gold Seal Chapter Award, with the goal of 15% of all active chapters qualifying for this recognition.

***RESULTS ACHIEVED**– The Gold Seal Chapter Award recognizes the most active chapters during the year. Three local chapters (10%) fulfilled all of the requirements and received this prestigious recognition. 2003 Gold Seal chapters were Asheville-Buncombe Technical Community College, Barton College, and Surry Community College.*

**GOAL E**– To encourage local chapters to submit a list of five potential contributors to the North Carolina Phi Beta Lambda Foundation.

***RESULTS ACHIEVED**–In an effort to generate funding for the North Carolina Phi Beta Lambda Foundation, chapters were urged to submit a list of five potential contributors. This was publicized at all Regional Kick-Off meetings and Regional Tip-Off workshops, at the Fall Leadership Development Conference, through Newsbriefs, on the state chapter website, and included as an option on the Blue Ribbon Award. As a result, four chapters submitted a list of potential contributors to the NCPBL Foundation. Chapters submitting a list of potential contributors were Blue Ridge Community College, Fayetteville Technical Community College, Isothermal Community College, and South Piedmont Community College. This list should provide Foundation Board Members with the resources needed to initiate a successful fundraising campaign.*

## VII. SUPPORT OF FBLA-PBL NATIONAL PROJECTS

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Local and state chapter involvement is the key element to the success of the national association. Through attendance and participation in conferences and support of national projects, the North Carolina State Chapter promotes involvement with the national organization. Through local chapter and state support, the national association strengthens its foundation.

**Goal A**–To encourage local chapters to use American Enterprise Day to increase public awareness of the American free enterprise system and FBLA-PBL Incorporated, as evidenced by a 20% increase in the number of entries in the American Enterprise Project event.

***RESULTS ACHIEVED**–Accomplishment of this goal was made possible by the activities of the local chapters across the state. The State Executive Council mailed public service announcements to all local chapters and included a full-page announcement in the fall edition of the state newsletter. These materials increased awareness of American Enterprise Day (November 15) and FBLA-PBL Month (February). Activities completed may be included in Blue Ribbon and/or Gold Seal documentation. As a result of these activities, six entries were submitted for the American Enterprise Project event at the 2003 State Leadership Conference: Asheville-Buncombe Technical Community College, Barton College (two entries), Beaufort County Community College, Nash Community College, and Surry Community College. This represents a 20% increase in local chapter participation.*

**Goal B**–To promote local chapter participation in national projects by providing informational sessions at the Regional Fall Kick-Off meetings and the Fall Leadership Development Conference and featuring an article in the fall edition of the state newsletter, with a goal of 10 chapters participating in at least one national project.

***RESULTS ACHIEVED**–At the 2002 Fall Leadership Development Conference, a workshop focusing on national projects emphasized how local chapters could use the variety of national projects as a basis for competitive events such as the Community Service Project. The workshop specifically highlighted the purposes of the current national projects and provided examples of possible local chapters' involvement. Activities completed may be included in Blue Ribbon and/or Gold Seal documentation. Ten chapters completed projects supporting the March of Dimes and contributed a total of \$623 to that organization.*

**Goal C**–To encourage active local chapters and their members to participate in the national association's Winners' Circle Program, with a goal of 10 members/chapters achieving this recognition.

***RESULTS ACHIEVED**–The Winners' Circle program was promoted at the Regional Winter Tip-Off workshops as well as by state officers visiting local chapters. Six members achieved this recognition.*

**Goal D**–To conduct Regional Winter Tip-Off workshops in February 2003 to promote activities for FBLA -PBL Week.

***RESULTS ACHIEVED**–In each of the three regions, a Winter Tip-Off workshop was held on February 7. The Eastern Region Tip-Off was held at Johnston Community College with eleven chapters in attendance. The Central Region Tip-Off was held at Randolph Community College with seven chapters in attendance. The Western Region Tip-Off was held at Isothermal Community College with six chapters in attendance. Local chapter officers and advisers discussed ways to promote activities for FBLA-PBL Week, including Adviser Recognition Day, connecting chapter projects, leadership development activities, campus and community visibility ideas, and professional division recognition.*

## **VIII. IMPLEMENTATION OF STATE LEADERSHIP CONFERENCES**

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The purpose of any leadership conference is to provide worthwhile activities to assist members in leadership development as they prepare to become tomorrow's business leaders. Conferences sponsored by the State Chapter provide opportunities for both growth and learning. Competitive events bring recognition not only to individuals but also to their local chapters. Leadership Development seminars illustrate the scope of interests and activities of Phi Beta Lambda. All who attend the conferences gain from the positive experience of seeing “their organization” excel.

**Goal A**–To sponsor a Fall Leadership Development Conference to assist local chapters in carrying out FBLA-PBL activities, with the goal of 80% of active local chapters in attendance.

***RESULTS ACHIEVED**–The 2002 Fall Leadership Development Conference was held October 25-26 at the Hilton Riverside in Wilmington, NC. The conference attracted 165 participants representing 20 NCPBL local chapters (65%). In addition, two advisers from an inactive chapter attended. Following mystery workshops led by state officers, State President Alison Foster called the Friday evening opening general session to order which featured guest speakers Sonya McCoy, 2002 Outstanding Adviser of the Year, Kevin McFadden, North Carolina Central University Professional Division member, and Dan Hazlett, Local Chapter Adviser at Stanly Community College. Each spoke of how involvement in Phi Beta Lambda had “Linked the Future” for their careers. After the opening session the special activity was the new “Millionaires” version of the Non-Trivia Contest coordinated by the NCPBL Professional Division. The regional winners then competed in the finals on Saturday. Surry Community College was the winner of the Non-Trivia Contest. Runners-up were North Carolina Central University and Beaufort County Community College. After the Non-Trivia Contest, attendees were treated to a riverboat cruise. Thirteen workshops were offered Saturday morning to aid members in preparation for the 2003 State Leadership Conference. Special guest, Southern Region Vice President Bryan Marangoni, conducted workshops and brought greetings from the National organization. The Non-Trivia finals were held with Surry Community College as the first place winner; runners-up were North Carolina Central University and Beaufort County Community College. (See Appendix A for chapters represented at the Fall Leadership Development Conference.)*

**Goal B**—To sponsor a State Leadership Conference for the major purposes of administering the State Awards Program, electing a new state officer team, and providing a Leadership Development Program, with the goal of 100% of active chapters in attendance.

***RESULTS ACHIEVED**—The 2003 State Leadership Conference attracted 407 members, advisers, and Professional Division members representing 29 out of 31 active local chapters (94%). The Conference was held April 3-6 at the Hilton University Place in Charlotte, NC. The keynote speaker of the conference was Mr. Steve Boehm, Vice President of Direct Access within the Wachovia Corporation. Mr. Boehm presented an outstanding speech on becoming a successful leader—not just a manager-- in the business world. Conference activities included general sessions, business sessions, election of new state officers, and the competitive events program. A traditional feature of the conference is the Leadership Development Program, a series of four success-strategy workshops. Participants attending any three of the four scheduled sessions received a Leadership Development Certificate. (See Appendix A for chapters represented at the 2003 State Leadership Conference.)*

*The highlight of the 2003 State Leadership Conference was the Formal Awards Banquet and Installation Services during which awards were presented in 44 events. Lisa Stephenson, Kentucky State Executive Secretary, and Scott Martin, Kentucky State Adviser, assisted in the awards presentations. State chapter members receiving first and/or second place awards in state-level competition earn eligibility for national-level competition. The State Awards Program was administered during the conference by advisers and Professional Division members. A six-member State Awards Program Coordination Committee verified event winners. Committee members were Ms. Teresa Parker (State Awards Program Director and Chair), Ms. Sue McIntyre, Ms. Cindy Killian, Mr. John Whiteheart, Ms. Marilyn Robertson, Ms. Kathy Doole, Ms. Carola Jones, and Ms. Donna Harbour. A complete listing of all chapter and individual award winners is posted on the state website and will be published in the 2003 fall state newsletter. (See Appendix D for 2003 National Leadership Conference qualifiers.)*

## **IX. ATTENDANCE AND PARTICIPATION AT CONFERENCES SPONSORED BY THE ASSOCIATION**

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Phi Beta Lambda members who are active in the state organization owe it to themselves to broaden the scope of their involvement with the national association by availing themselves of the opportunities offered at national conferences. Opportunities at national conferences are not limited to competitive events alone but also include the business sessions, workshops, national officer elections, Institute for Leaders, as well as the experience of traveling to new places and appreciating the diversity of many cultures.

**Goal A**—To encourage all national qualifiers to attend the 2002 National Leadership Conference, with a chapter representation goal of 50% .

***RESULTS ACHIEVED**—Sixteen out of 31 active local chapters (52%) from North Carolina attended the 2002 National Leadership Conference in Nashville, TN. A total of 105 delegates, advisers, Professional Division members, and guests comprised the North Carolina National Leadership Conference delegation, which was one of the largest state delegations at the conference. (See Appendix A for chapters represented at the 2002 National Leadership Conference.)*

**Goal B**-To encourage state participation at the 2002 National Fall Leadership Conference, with a goal of five NCPBL representatives in attendance.

***RESULTS ACHIEVED**—North Carolina Phi Beta Lambda encouraged state officer attendance at the National Fall Leadership Conference through budgeting \$300 for each attendee. One state officer, three members of the State Committee, and one Professional Division Member attended the conference in Jacksonville, FL. Mr. Terry Lowrance, Mr. Dan Hazlett, Mr. Eric McGarvey, Mr. Ron Eggers, Ms. Teresa Parker, and Ms. Alison Foster led various workshops during the conference. (See Appendix A for chapters represented at the 2002 National Fall Leadership Conference.)*

**Goal C**-To encourage state participation at the 2002 Institute for Leaders in Nashville, TN, with a goal 15 of NCPBL representatives in attendance.

***RESULTS ACHIEVED**--Effective leadership training is essential for the survival of both the state chapter and local chapters. State and local chapter officers were encouraged to attend the Institute For Leaders at the National Leadership Conference. State officers are budgeted \$300 as an incentive for attendance at this national program. North Carolina had three members attend the Institute For Leaders at the 2002 National Leadership Conference.*



# *Businesslike Procedures*

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Professional Division Member Jeff Daniel speaks at a chapter installation

Adviser and Professional Division Member Sonya McCoy speaks at Tip-Off



## **I. CHAPTER MANAGEMENT AND ORGANIZATION**

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To support the mission statement and goals of FBLA -PBL, the North Carolina Phi Beta Lambda State Chapter utilized the following chapter management tools to develop, implement, and accomplish its annual predetermined plan of action.

### **ORGANIZATIONAL STRUCTURE**

The organizational structure of the State Chapter is consistent with that of the national association. The State Executive Council provides the leadership and continuity for sustaining the State Chapter. (See Appendix C for the 2002-2003 State Organizational Chart.)

### **STATE EXECUTIVE COUNCIL**

The State Executive Council directs the activities of the State Chapter. The Council is comprised of the state officers and their local chapter advisers, the state adviser, the state chairman, the directors, and the state Professional Division officers. Council meetings are conducted according to Robert's Rules of Order. Four official meetings were held during the 2002-2003 year. (See Appendix B for the 2002-2003 Executive Council membership.)

### **REGIONAL STRUCTURE**

The State Chapter is organized into three geographical regions within the state in order to promote communication, growth, and activities development. A vice president is elected from each of the three regions to serve as the regional coordinator with the State Chapter. (See Appendix A for regional divisions and Appendix B for Regional Vice Presidents.) To promote active involvement of all chapters, awards are presented at the regional meetings of the Fall Leadership Development Conference and the State Leadership Conference.

### **STATE CHAPTER GOALS**

Goals for the State Chapter were established as a plan of action for the year. These goals were developed at the Spring Executive Council meeting in June. The goals were distributed to the state's local chapters by the Regional Vice Presidents at the Regional Fall Kick-Off meetings, published in the state handbook, and posted on the state chapter website. Local chapters then developed their own goals to complement those of the state organization. The 2002-2003 goals (and results achieved) are presented in the Productivity section of this report.

### **MINUTES**

State Secretary/Treasurer Gina White kept accurate minutes for each of the Executive Council meetings and for the State Leadership Conference. Copies of the Executive Council minutes were made available to all local chapters. Copies of the 2002 State Leadership Conference minutes were distributed to local chapter voting delegates at the 2003 State Leadership Conference for approval during the business session. Permanent copies of all minutes are retained on file in the State Adviser's office.

## **STATE MEMBERSHIP RECORDS**

State Chapter membership records are maintained and updated throughout the year. The State Chapter concluded its 2002-2003 membership year with 805 members in 31 active local chapters. Membership certificates were provided to each State Chapter member. (See Appendix A for membership totals.)

## **2002-2003 STATE CHAPTER ANNUAL BUSINESS REPORT**

The 2002-2003 State Chapter Annual Business Report provides a summary of activities conducted during the 2002-2003 year. Copies of this report are distributed to state officers, Professional Division officers, and local chapters, printed in the State Handbook, and posted on the state website. Copies of this report are used to promote Phi Beta Lambda within the business community and to stimulate interest in the chartering and reactivating of local chapters within the state.

## **IDENTIFICATION BADGES**

Each state officer, state adviser, director, and Professional Division officer was provided a metal identification badge. The badges were cast with the individual's name and position along with the year and Phi Beta Lambda shield. The badges were worn at all Phi Beta Lambda conferences and meetings as well as other functions where Executive Council members served as an official NCPBL representative.

## **CONFERENCE PROMOTION**

For each state, regional, and national conference, the state directors prepared detailed conference promotional packets that were mailed to the local chapters and Professional Division members. The state directors also secured conference locations, coordinated hotel reservations and transportation, and facilitated registration and participation.

## **II. FINANCIAL DEVELOPMENT**

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To support the mission statement and goals of FBLA -PBL, the North Carolina Phi Beta Lambda State Chapter utilized the following chapter financial tools to develop, implement, and accomplish its annual predetermined plan of action.

### **FINANCIAL STATEMENTS**

State Secretary/Treasurer Gina White prepared financial statements and updates throughout the year for Executive Council meetings. The State Chapter operated within a budget that was developed during the Spring Executive Council meeting in June. Disbursement of funds was made according to the guidelines of the budget. Extraordinary and non-budgeted items received approval of the Executive Council prior to disbursement of funds. End-of-year financial statements were presented to the voting delegates and read to the general state membership during the business session at the State Leadership Conference. A CPA conducts an audit of the financial records annually. Permanent copies of all financial statements are retained on file in the State Adviser's office. (See Appendix E for the 2002-2003 Financial Statement.)

### **FUNDRAISING**

Each North Carolina local chapter conducts fundraising efforts to achieve its program of work. The North Carolina State Chapter utilizes only membership dues and conference registration fees to generate funds.

# *Appendices*

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NCPBL State Officers



NCPBL State Committee Members



NCPBL Professional  
Division Officers

**APPENDIX A**  
**2002-2003 NORTH CAROLINA PHI BETA LAMBDA MEMBERSHIP**  
**AND CONFERENCE ATTENDANCE (BY CHAPTER)**  
**NORTH CAROLINA PHI BETA LAMBDA**

**CHAPTERS**

**CONFERENCES ATTENDED**

(\*)

	NLC	FLDC	NFLC	SLC	Membership
<b>EASTERN REGION</b>					
Barton College	X	X	X	X	107
Beaufort County Community College	X	X		X	43
Chowan College		X			10
Craven Community College		X		X	24
Elizabeth City State University				X	19
Fayetteville State University		X		X	17
Fayetteville Technical Community College	X	X		X	51
Johnston Community College		X		X	10
Lenoir Community College	X	X		X	13
Mount Olive College	X	X		X	26
Nash Community College	X			X	19
Sampson Community College	X			X	10
Southeastern Community College				X	25
<b>CENTRAL REGION</b>					
Durham Technical Community College	X	X	X	X	12
North Carolina Central University	X	X		X	90
Pfeiffer University		X		X	10
Randolph Community College				X	13
Saint Augustine's College				X	25
South Piedmont Community College				X	30
Stanly Community College	X	X	X	X	6
Wake Technical Community College		X		X	9
Winston-Salem State University				X	26
<b>WESTERN REGION</b>					
Appalachian State University					26
Asheville-Buncombe Tech. Com. College	X	X		X	42
Blue Ridge Community College				X	20
Isothermal Community College	X	X		X	20
Lees-McRae College	X			X	4
Lenoir-Rhyne College		X		X	16
Mitchell Community College	X	X		X	8
Surry Community College	X	X		X	35
Wilkes Community College	X	X		X	39
<b>MEMBERSHIP FOR 31 ACTIVE LOCAL CHAPTERS</b>					<b>805</b>
Livingstone College (Guest)		X			

**NCPBL PROFESSIONAL DIVISION** (29 local chapters represented -- 205 members)

\*NLC: 2002 National Leadership Conference, Nashville, TN

FLDC: 2002 Fall Leadership Development Conference, Wilmington, NC

NFLC: 2002 National Fall Leadership Conference, Jacksonville, FL

SLC: 2003 State Leadership Conference, Charlotte, NC

**APPENDIX B**  
**2002-2003 STATE EXECUTIVE COUNCIL**  
**NORTH CAROLINA PHI BETA LAMBDA**

**STATE OFFICERS**

**PRESIDENT**

Alison Foster  
Barton College

**EASTERN REGION VICE PRESIDENT**

Jim Daniels  
Johnston Community College

**SECRETARY/TREASURER**

Gina White  
Barton College

**CENTRAL REGION VICE PRESIDENT**

Ashley Hayes  
Surry Community College

**HISTORIAN**

Ty McLean  
Asheville-Buncombe Technical Community College

**WESTERN REGION VICE PRESIDENT**

**STATE COMMITTEE**

**STATE ADVISER**

Terry C. Lowrance  
Durham Technical Community College

**CHAPTER DEVELOPMENT DIRECTOR**

Ron Eggers  
Barton College

**AWARDS PROGRAM DIRECTOR**

Teresa Parker  
Barton College

**PUBLICATIONS DIRECTOR**

Debra Baker  
Beaufort County Community College

**LEADERSHIP DEVELOPMENT DIRECTOR**

Kathy Toler  
Asheville-Buncombe Technical Community College

**PROFESSIONAL DIVISION DIRECTOR**

Robbie F. McDonald  
Duke Energy, Charlotte

**LOCAL CHAPTER ADVISERS OF STATE OFFICERS**

Carola Jones  
Donna Harbour  
Kathy Doole

Johnston Community College  
Surry Community College  
Asheville-Buncombe Technical Community College

**STATE PROFESSIONAL DIVISION OFFICERS**

**PRESIDENT**  
**VICE PRESIDENT**

Michael Coffey, Wilkesboro  
Dorothea Ely, Durham

**APPENDIX C**  
**2002-2003 STATE ORGANIZATIONAL CHART**  
**NORTH CAROLINA PHI BETA LAMBDA**

**FBLA-PBL NATIONAL ORGANIZATION**

**FBLA-PBL STATE CHAIRMAN**

**NCPBL STATE ADVISER**

**NCPBL STATE COMMITTEE**  
**(State Chairman, State Adviser, & State Directors)**

**STATE EXECUTIVE COUNCIL**

State Chairman  
State Adviser  
State Directors  
State President and Local Adviser  
Eastern Region Vice President and Local Adviser  
Central Region Vice President and Local Adviser  
Western Region Vice President and Local Adviser  
State Secretary/Treasurer and Local Adviser  
State Historian and Local Adviser  
State Professional Division President  
State Professional Division Vice President  
State Professional Division Secretary/Treasurer



**LOCAL CHAPTERS**

**APPENDIX D**

**2003 NATIONAL LEADERSHIP CONFERENCE QUALIFIERS**

**DALLAS, TEXAS**

**NORTH CAROLINA PHI BETA LAMBDA**

Event	Participant	Chapter
Accounting Principles	Andrew Roberts	Wilkes Community College
	Carolyn Hubbard	Blue Ridge Community College
Accounting for Professionals	Scott Bullock	Durham T. C. C.
	Tracye Carter	Sampson Community College
American Enterprise Project		Barton College
		Barton College
Business Communications	Ebony Robertson	North Carolina Central U.
	Carmella Blakney	Durham T. C. C.
Business Decision Making	Bailey, Barefoot, Foster	Barton College
Business Law	Michelle Poole	Isothermal Community College
	Tabel Parker	Sampson Community College
Business Plan	Palmer, Anders	Blue Ridge Community College
	Dodd, Wingate	Lenoir Community College
Business Principles	Aomi Howard	St. Augustine's College
	Jessica Dickerson	Surry Community College
C++ Programming	Jon Munsey	Isothermal Community College
	Ashley Hayes	Surry Community College
Community Service Project		North Carolina Central U.
		Barton College
Computer Applications	Kamau Scott	Fayetteville T. C. C.
	Donnie Hammond	Southeastern C. C.
Computer Concepts	Joshua Durand	Fayetteville T. C. C.
	Kathy Woods	Asheville-Buncombe T. C. C.
Desktop Publishing	Byrd, Jones	Lenoir Community College
	Haybraft, Reynolds	Fayetteville T. C. C.
Economics	Cassandra Stirewalt	Pfeiffer University
	Jeremy Branch	Surry Community College
Emerging Business Issues	Sanders, Porter	North Carolina Central U.
Finance	Connie Clippard	Surry Community College
	Robin Kornegay	Mt. Olive College
Future Business Executive	Kim Miller	Lenoir Community College

	Tracy Robinson	North Carolina Central U.
Future Business Teacher	Dondi Byrd	Lenoir Community College
	Lucy Stutz	Craven Community College
Hospitality Management	Whitney Bowman	Lenoir-Rhyne College
	Deborah Woods	Surry Community College
Human Resource Mgt	Marissa Williams	North Carolina Central U
	Melissa Caswell	Stanly Community College
Impromptu Speaking	Scotty Parker	Surry Community College
Information Management	Brandy Napier	North Carolina Central U.
	Randy Glover	Barton College
International Business	Amanda Douglas	Surry Community College
	Emily Joy Daughtry	Mt. Olive College
Job Interview	Steven Kennedy	Surry Community College
Local Chapter Annual Business Report		Barton College Asheville-Buncombe T. C. C.
Management	Monica Thurman	North Carolina Central U.
	Bill Hyman	Durham T. C. C.
Marketing	Stephanie Wilson	North Carolina Central U.
	Michael Cole	Asheville-Buncombe T. C. C.
Multimedia Presentation		Isothermal Community College
		Beaufort C. C. C.
Network Design	Barefoot, Daniels	Johnston Community College
Networking Concepts	Cynthia Seighman	Beaufort C. C. C.
	Martha Holland	Asheville-Buncombe T. C. C.
Parliamentary Procedures		North Carolina Central U.
Partnership with Business		Barton College
		Asheville-Buncombe T. C. C.
Public Speaking	Kendal Smith	Durham T. C. C.
Quantitative Methods	Andy Spicer	Surry Community College
	Tim Peacock	Surry Community College
Telecommunications	Sean Pressley	Asheville-Buncombe T. C. C.
	Kamau Scott	Fayetteville T. C. C.
Visual Basic Programming	Edward Wiggins	Lenoir Community College
	Tim Hurlburt	Stanly Community College
Website Development		Fayetteville T. C. C.
		Lenoir Community College
Word Processing	Amy Robinson	Blue Ridge Community College
	Elaine Price	Nash Community College
Who's Who in NCPBL	Alison Foster	Barton College
Outstanding Chapter Advisor	Sue McIntyre	Stanly Community College
Business Person of the Year	Ronald Hunter	North Carolina Central U.
	Joel Benson	Blue Ridge Community College



TOTAL	<u>\$ 13,080.38</u>	FLDC	<u>2,292.11</u>	7,731.18
		TOTAL		<u>\$13,080.38</u>