



August 23, 2023

Kappa Delta Sorority
3205 Players Lane
Memphis, TN 38125

To whom it may concern,

It is my pleasure to recommend Peter Winters, Senior Director of Global Accounts, and HelmsBriscoe for your event planning and management needs. My organization was introduced to Peter almost ten years ago through an enthusiastic referral from our colleagues at the University of Arizona. Over the years, Peter has become a trusted partner, using his industry insights, connections and resources to identify and negotiate competitive pricing and services from properties across the country, meeting our needs and saving me countless hours of research and negotiation.

While the scope of our relationship for many years was limited to a small scale (100 participants) annual conference for 4-H's state leadership, that changed with COVID. In the spring of 2021, with the permanent closure of 4-H's national conference facility in Chevy Chase, I enlisted Peter's help to identify a new home for several of the youth leadership events National 4-H Council hosts for teens from across. These events attract between 300 and 1,000 youth. As you might imagine, the requirements for these experiences are very different from those of our adult, professional development conferences.

Peter jumped right in, carefully taking stock of our criteria and the changing hotel and venue landscape in the midst of an ongoing pandemic. Peter understood that for us, this was not simply a change of venue, but a decision that could have lasting impacts on our reputation as 4-H's national partner and the trust our local programs place in us. He took time to meet with our executive team, ensuring they could provide input into our selection process, managed the RFP process with a variety of hotels and conference facilities in the Washington, DC area, and planned two days of site visits to aid my team in our final selection. In December of 2021, when COVID cases were on the rise, Peter again worked with one of our chosen properties to amend our contract so that we could postpone our event without penalty.

You will find Peter to be a proactive, responsive and patient partner. He regularly checks in unprompted to ensure the working relationships with our event properties are going smoothly and has been ready to offer guidance, or intervene on our behalf, anytime we've needed it. I know Peter also has long-standing working relationships with a number of fraternities and sororities and has a deep understanding of the unique needs of panhellenic organizations. If I can provide additional information or answer further questions, please contact me at 703-785-4762, jmciver@fourhcouncil.edu.

Sincerely,

Vice President, Extension Engagement

PHI KAPPA PSI FRATERNITY

Intellect. Morality. Spirituality. Loyalty.

August 24, 2023

To whom it may concern:

It is my distinct honor to submit this letter to recommend the services of Peter Winters with Helms Briscoe. My name is Ron Ransom and I serve as the Executive Director of Phi Kappa Psi. While the start of Peter's relationship with Phi Kappa Psi predates my work on events, I have had the privilege of working directly with Peter since 2015. Since 2015, Peter has served as an educator, negotiator, advocate, and sometimes motivational coach as we have identified meeting and event sites. I can always count on Peter when we search for sites for small regional events, board meetings, and conventions. Regardless of the size, cost, or location, Peter takes time to ensure that all our needs are properly addressed and supported.

Peter is extremely knowledgeable of the ever-changing hospitality industry. When I first began working on events, Peter helped me understand the complexities of site selections, including the process and some of the challenges that I could anticipate. We discussed past decisions that were made during site selection for our organization, concerns and desires that I had when searching for future sites, and things I should consider to improve our process and success in identifying a hotel that best fit our needs.

When planning for convention, I look forward to beginning the site selection process with Peter. It typically begins with me sending him an obscene number of cities where we might be interested in hosting our convention. Peter doesn't just take the list. We take time to discuss why I've selected the cities that I've selected. Is it because of the airport, to be near a beach, or is their historical significance related to our organization? Each of his questions helps to ensure that the sites he is reaching out to align with our desire to host a convention in those cities. When Peter has identified properties that are available, we take time to discuss each of the properties, what they can offer, and how the offer fits our needs. He also shares with my why some properties that could host our event are unable or unwilling to consider us. This feedback has helped me consider small changes that we might be able to make in our planning process to increase our convention hotel options.

After we have narrowed down our sites, having Peter present for site visits has proven to be invaluable. Peter is the only person who understands the ins and outs of our convention needs like I do, and that is clear from the time that we begin touring locations. His understanding of our meeting patterns, how we gather and use the space, and what is most important to us is apparent in each site that we visit. The questions that he asks during our tours, the suggestions and insights that he offers me, and the ideas he is able to share provide further proof that Peter has not just reached out to any available sites.

Because of Peter, it seems like the negotiation phase is easy...and I know it's not, at least for him. Peter takes care of it. Peter has managed to help us secure great prices and terms through the contract negotiation process. Peter works closely with us and the hotels to ensure that we have everything that we need, and typically much more by the time the negotiations are finalized. Of note is the clause that Peter

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had added into our 2020 convention contract regarding pandemics and CDC emergencies (we signed the contract in 2017). The clause made it easy for us to shift our convention at the hotel to 2024 during the early stages of the pandemic.

During our conventions, Peter always makes himself available (sometimes in person) to ensure that our experience is exactly what we hoped it would be. From the BEO's to the convention space to our audio-visual needs, Peter has been there to support us in the midst of the most hectic times during our conventions.

After our event has concluded, Peter reaches out to ensure that everything went as expected, and engages with us on finalizing the experience, including follow up on billing and service from the hotel. Peter never hesitates to address any concerns or issues that we may have had with the hotel, even though I can't think of many times it has been necessary. We discuss any feedback from participants regarding the site location and note anything that we need to consider when planning for future conferences and events.

While I have shared with you a lot about what Peter does, I believe what truly makes Peter stand out is how he does it. Peter is patient, respectful, and persistent. He has worked with me through the various shifts that I've had to make during the site selection process because a board member has a "strong suggestion" that he wants us to consider or because I don't feel good about the options that we have. He listens to my ideas, suggestions, feedback, and doesn't just pass on things because it's outside of the box. Peter has challenged me to dream bigger through his persistence to secure more for us. I believe all of this is possible not only because of the relationship that I have with Peter, but also because of the relationships that he maintains with so many others throughout the industry.

My time working with Peter has been more than a business relationship. I consider Peter to be a true partner, advocate for Phi Kappa Psi, and a friend. His work reflects an extraordinary depth of knowledge in the hospitality industry, respect for my role and the challenges that come with it, and a true belief in the power of the fraternity and sorority movement.

If you have any further questions regarding our organization's relationship with Peter, I would be more than happy to speak with you. You can reach me at rkr@phikappapsi.com.

Sincerely,

A handwritten signature in dark ink, appearing to read "RKR...". The letters are stylized and connected, with a small flourish at the end.

Ronald K. Ransom II
Executive Director



Business and Conference Services

To Whom It May Concern:

I am writing this letter to recommend Peter Winters from HelmsBriscoe to provide you with hotel sourcing services.

I work for the Arizona School Boards Association and have utilized Peter's expertise for 15 years. The partnership our association has had with him has been invaluable. Our association is small, and I wear many hats. Researching locations, contacting, and evaluating venues takes much time. Having someone you can trust to handle that portion of the event planning process allows more time to be spent on all the other responsibilities surrounding an event.

Because of our long-term relationship, Peter has an excellent grasp of what our association needs in an event location. He is intuitive and forward-thinking when it comes to making recommendations. He is knowledgeable of industry trends and stays current on the constantly changing world of events. Because of this, I never hesitate to ask his opinion on an innovative way to change something and make it more exciting.

Our association generally hosts the same meetings each year. We negotiate multi-year deals with one hotel for our more significant events to get competitive rates. Peter has a remarkable ability to work with venues to secure those rates. For people to attend our events, we must be conscious of the costs they will incur there. Peter can convey that message to properties during the negotiation process so they understand the financial constraints we operate under.

Knowing that I can rely on his expertise during the contract process helps put my mind at ease. Hotel contracts are involved and require great attention to detail to ensure you are protected. When I receive the first draft of the contract, I am confident that all the initial needs have been met. Peter truly advocates for your needs and always makes recommendations based on the scope of your requirements.

I am happy and proud to recommend Peter and HelmsBriscoe to help with your event sourcing needs. He has provided excellent service for our large, small, long-term, and short-term meetings and events. He is a valued, extended member of our team.

If you would like additional information, please call me at 602-254-1100.

Sincerely,

Ellen White

Director of Business and Conference Services
Arizona School Boards Association

Sigma Alpha Mu Fraternity



August 16, 2023

Via Email

RE: Letter of Recommendation

Dear Mr. Peter Winters:

Please feel free to include the following letter of recommendation in your RFP process with Kappa Delta.

Peter has been a valued partner of mine for many years. I worked with him during my tenure at the North-American Interfraternity Conference and have continued to use his services at Sigma Alpha Mu. As a third-party used to source meetings, Peter has been much more than that to me. He's a friend, an advocate for the fraternity movement, and a source of insights on the meeting industry.

Frankly, he fought hard for us during COVID-19 at his own expense of lost or deferred revenue. The result was a shifting of a program from 2020 to 2021 and then to 2023. We paid no cancellation fees and were able to shift our deposits. To be candid, I don't think we would have gotten that outcome but for the leverage of Peter's boarder portfolio and the HelmsBriscoe brand.

Peter has also worked alongside Sigma Alpha Mu's staff to source venues for regionally based programs. Those events require significant meeting space and few commissionable room nights. Even though that's the case, he is willing to do the work on our behalf. Peter has brought a wealth of knowledge from other fraternal and association clients to help us find the right venues. At Sigma Alpha Mu, that has meant finding the right sized properties where we can be the big fish in a small pond – resulting in better customer service, attention and support from the properties that we have contracted.

I'm confident Kappa Delta would be well served by Peter Winters and HelmsBriscoe.

Fraternally,

Andy Huston
Executive Director

CC:
Chapter File
Chapter Council
Standards Committee
House Corporation
Staff



Members of Kappa Delta Sorority,

Three years ago, I joined the Fraternity Service Center Team at Sigma Alpha Epsilon. In the heart of the COVID-19 Pandemic, one of my first responsibilities was to renegotiate or cancel 13 different hotel contracts, with a potential buyout value of nearly \$400,000, resulting from a shift in program priorities across the organization. This doesn't even include the fact that we were just eight months away from our National Convention, with little to no planning having taken place to date. Just two weeks after starting, I was introduced to Peter Winters, and the rest is history.

First and foremost, Peter believes in and advocates for the Fraternity and Sorority experience, regardless of the organization. In working with Peter, it has been my belief that he always has Sigma Alpha Epsilon's best interest at heart and provides great insight and perspective into planning events, making recommendations, and other firsthand knowledge he may have about properties or ownership groups when we work with him for any of our needs. He is what I would consider a true partner. Not once during the time I have had the pleasure of working with Peter have I hesitated to pick up the phone and call him or send an email, and I know I will always get an honest and quick response.

What I appreciate most about Peter is that he personally invests in our programs and events to understand what we are trying to achieve. He asks strategic questions as well as makes suggestions or provides things for us to consider related to experiences he has with other groups or ways he can help improve our event. He always works to secure multiple quotes and even makes arrangements at multiple properties. In fact, at our most recent National Convention, he worked through the weekend in the lead-up to our event to secure additional rooms at a neighboring property after we sold out our original host hotel.

Peter is never satisfied unless we are satisfied. He regularly checks in leading up to events. He has always stepped in if we have experienced any difficulties in working with a property and has even advocated/negotiated when a property has not lived up to what was agreed upon in the contract. He really is the complete package, and there have been many times that I am not sure what I would do without Peter.

I believe, without any hesitation, you would have the same positive experience in working with Peter. If I can be of any additional assistance during this process, or provide any additional insight, please do not hesitate to reach me by email at slong@sae.net or by phone at 224-422-0848.

Fraternally,

Spencer Long, Ed.D.
Chief Operating Officer
Sigma Alpha Epsilon Fraternity



Dear Members of Kappa Delta Sorority,

My name is Gary Wiser, and I am the Executive Director for the Southeastern Greek Leadership Association (SGLA). Peter Winters with HelmsBriscoe has worked with our organization since 2011 when we were SEIFC, and I have worked directly with him since I became Executive Director in 2014. It is my pleasure to recommend Peter to assist with Kappa Delta's hotel contract services.

Peter is a strong advocate for fraternities and sororities, and he is very knowledgeable about trends in the meeting industry, hotel properties, and convention cities. He has been a tremendous help to our conference board as we transitioned the conference from SEIFC to SGLA to be inclusive of all fraternity and sorority governing councils, and he navigated us through the challenges associated with the COVID-19 pandemic.

In our entire time working with Peter, he has helped keep our conference as one of the most cost-effective student conferences in the country by securing low hotel rates and competitive meal costs in Atlanta. The first property he contracted for us was the Westin Buckhead Atlanta, which also served Chi Omega and Kappa Alpha Order for their regional conferences. In 2021, Peter was able to re-negotiate our contract with the Westin to not have to meet the hotel block guarantee and food and beverage minimum because we could not afford to cancel the contract.

During our transition to SGLA, Peter was with us every step of the way beginning with the RFP process to secure a convention hotel that could handle the potential growth of an all-inclusive conference in the Southeast. He was with us in person for site visits at three hotels, including our current home at the Renaissance Waverly Atlanta. As SGLA continues to grow, he has helped us to expand the room block at without passing on more costs to our attendees, and he uses his knowledge of Atlanta and comparative cities to help us think strategically about future contract extensions. I have always been able to rely on Peter to advocate for us when we need assistance managing issues with hotels when they arise, and he has always been able to find solutions to best meet our needs.

Peter is a trusted partner who always wants to see his clients have the best conference experiences possible. I do not know if SGLA would be as successful today without Peter's investment in the success of our conference, and I cannot think of anyone better to serve Kappa Delta in this capacity. If you would like to speak further about my experiences with Peter, please contact me at info@sgla.org or 615-512-6267.

Sincerely,

A handwritten signature in black ink, appearing to read "Gary Wiser", written in a cursive style.

Gary Wiser, Ed.D.
Executive Director



Sigma Phi Epsilon Fraternity

Zollinger House

310 South Arthur Ashe Boulevard • Richmond, VA • 23220-5706

Tel: 804.353.1901 • Fax: 804.359.8160 • www.sigep.org

August 22, 2023

The team at Kappa Delta -

As you are working through the proposal process for a new third-party partner, I wanted to take a minute to recommend Peter Winters from Helms-Briscoe. Like you all, back in 2016, we began a similar search and had many of the same requests that you all listed in your RFP. We ultimately made the decision to partner with Peter ... and, again and again, he's shown us what a great decision that was.

Depending on the year, Peter helps us with between 6-10 programs ranging from 150 people to over 1,200 attendees. Regardless of the event or its size, he takes the time to understand our event needs and works with hotels and CVBs to pull together a comprehensive list of potential hotels and their proposals. I'm guessing similarly to Kappa Delta, we have some alumni who are very passionate about bringing certain events to their "home" and Peter is great about also providing information on why certain hotels wouldn't or couldn't work which allows us to openly and accurately communicate to those alumni.

Once we have a chance to review the potential hotels, we inevitably have questions about what they did or didn't offer and Peter does an exceptional job of getting any and all information needed so we feel comfortable and confident. He coordinates the details of our site visits and even attends some as well, providing valuable insight throughout.

After selecting a preferred hotel, Peter goes above and beyond to ensure we get the best possible contract for SigEp. He knows what is most important to the organization and is able to accurately express that to the hotel and serve as an advocate for us while still maintaining (or creating) a great relationship with the hotel.

His work doesn't end when the contract is signed, though. Peter is always there as a resource for questions or to jump in when a situation arises.

Here are a few examples of situations where Peter went above and beyond to help us:

- Earlier this year, a week out from our first leadership conference, I received a call from our hotel that all our meeting space flooded, they were not going to be able to host us and they were enacting force majeure. Peter immediately got on the phone to other hotels and, within 24 hours, he secured another property that could hold us the very next week. He pushed to quickly get us under contract (and with similar terms and pricing as the original contract so we stayed under budget).
- One of the first events we held coming out of the pandemic was a donor weekend in Puerto Rico. We were nervous about numbers (for sleeping roomd and F&B) as we weren't sure what attendance would look like and if we would hit minimums. Peter

listened to those concerns and worked with the hotel to add in verbiage to help protect us - basically allowing any "overage" in F&B to offset potential sleeping room attrition - without having to increase our very low F&B minimum. We did have lower numbers than expected (on the sleeping room side) and that clause alone saved us tens of thousands of dollars.

- There have been several situations where our hotel partner was in breach of contract, often by offering a lower rate on their website than our group rate. Not only has Peter ensured there's a clause to that effect in our contract, he's always quick to jump in and work with the sales contact to rectify the situation to our advantage.
- On multiple occasions, just when it seemed like we were getting to an impasse in contract negotiations (whether it be with a minimum, meeting space, etc), Peter was able to leverage his skills and relationships to work through it with the hotel ensuring a "win-win" for both parties.

Perhaps the biggest compliment - I cannot tell you the number of times I've been on a site visit (without Peter) and the sales manager has said what a wonderful experience they've had working with him. Relationships matter in this industry and Peter does a wonderful job of nurturing those relationships with hoteliers while still being a strong advocate for us. I'm about to start my 18th year in this role at SigEp and I can confidently say that we are in excellent hands with Peter and I know you would be as well!

If you have any specific questions about our experience, please do not hesitate to reach out. I'm more than happy to help!

Best of luck with your search!

A handwritten signature in black ink, appearing to read "Stacy Nicodemus". The signature is fluid and cursive, with a long horizontal line extending from the end.

Stacy Nicodemus, CMP
Programs & Events Director
stacy.nicodemus@sigep.net
804.869.3838

August 22, 2023

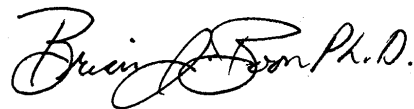
To Whom It May Concern:

Regarding: Mr. Peter Winters-HelmsBriscoe letter of recommendation-Kappa Delta Sorority RFP

I have been asked by Mr. Winters to provide a reference letter as part of an RFP process for conference services and events. I have worked with Mr. Winters for approximately 20 years in relation to conference and event services in his various capacities in the industry. Most recently with HelmsBriscoe, Mr. Winters and his team have worked to articulate our unique conference needs and price points in a contract negotiation strategy that has resulted in several repeated long-term conference events (repeated 5-year term cycle contracts) with key hotels in the Tucson area and in other locations. Mr. Winters and his team have been able to secure competitive high value contracts that meet the ongoing needs of our company that included up front negotiation of all matters related to price, service, hotel nights, and food services supplemented with additional ongoing support through the life cycle of the contract. Life cycle support has included ongoing vigilance of contracted conference events and services, oversight of congruence with contract expectations, intervention when conflicts arise and post service engagement when necessary. Further, Mr. Winters and his team also keep us, as his customer, aware of trends in the hotel and conference industry that may impact immediate or long-term plans for growth and service.

I have no hesitation recommending Mr. Winters-HelmsBriscoe as a competitive and experienced player in this market.

Regards,



Brian J. Boon, Ph.D.
President/CEO