



Annual Report 2008-2009

Sigma Nu Educational Foundation

Vision Statement

Support the development of ethical leaders and cultivate a lifelong commitment to the educational and charitable missions of Sigma Nu Fraternity.

Mission Statement

The Sigma Nu Educational Foundation secures and provides enduring resources in support of the Fraternity's educational mission!

We will:

- Cultivate a lifelong commitment to the educational and charitable mission of Sigma Nu Fraternity; Support educational and leadership programming initiatives of the Fraternity;
- Provide scholarships to support academic achievement;
- Provide grants and loans to support educational facilities;
- Maintain the Shrine;
- Enable members and friends to support these initiatives through tax-deductible contributions.

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I. Letter from Chairman Bill Stoffer



Dear Brothers, Supporters and Friends:

After a year like the one our nation has just endured, it's nice to have some good news to share. I'm pleased to report that the Sigma Nu Educational Foundation just closed the books on our second best year in recent memory in terms of alumni loyalty and giving.

In June 2009, our capital campaign, *Building Upon the Rock...Preserving Our Future*, reached the \$10 million mark on the way toward our \$14 million goal. Funds raised will further our efforts to expand the Fraternity's educational programs, strengthen staff support to carry out the Foundation's vision, grant additional housing and scholarship funds for our undergraduate chapters and provide for the historic preservation of our Headquarters. Already the Foundation has increased its grants and scholarships by 25% compared to last year, giving \$1.5 million in grants to the Fraternity, chapter housing and scholarships for undergraduate Brothers.

This encouraging news is bolstered by the fact that we've already seen growth in the Fraternity's exceptional leadership training initiatives, with an increasing number of attendees in 2008-2009. In addition, the LEAD Program was honored with two awards this year, and LEAD Phases I, II and IV are now available in an online format providing Brothers the opportunity to learn at their own pace and convenience. LEAD follow-up surveys tell us that participants are demonstrating a greater awareness of their personal values, growing in their ability to handle ethical dilemmas and increasing in their problem solving skills and confidence in their ability to initiate change.

These accomplishments are owed to the support of Sigma Nu alumni just like you. Throughout this annual report you will learn more about how your generosity is *Building Upon the Rock...Preserving Our Future*. I trust you will be encouraged with our progress and excited about the Foundation's direction for the future.

Allow me to extend my sincere thanks to each of you who has demonstrated your leadership by

participating with us in building a stronger Fraternity. Every member, friend and organization that supported the Foundation this year is named elsewhere in this report in recognition of the part you played in our recent accomplishments. Thank you.

If you have not been an active supporter, I encourage you to join our ranks today. Foundation giving is the primary source of funding for the exceptional educational programs of the General Fraternity, which serve to benefit every undergraduate member of our 179 chapters and colonies across the United States and Canada. There is still much work to be done. Won't you help us to deliver the Sigma Nu experience to the deserving young leaders of tomorrow.

Yours in brotherhood,



William K. (Bill) Stoffer (Albion)
Chairman, Sigma Nu Educational Foundation

II. 2008-2009 Year in Review

2008-09 Yields Second Best Year Bolstered by Significant Campaign Giving

In the midst of challenging economic conditions, loyal Brothers continued to invest in the future of Sigma Nu making 2008-2009 the Foundation's second best year ever. Our record-breaking year in 2007-2008 showed significant growth in the total number of donors and first-time donors to the Foundation. While the same numbers were down this year compared to last, the total number of donors remained 16% higher than two years ago.

In 2008-2009:

- Foundation staff members visited **415 young alumni** to share Sigma Nu's vision for *Preserving the Future* of the Legion of Honor.
- The **SOLD!...for Sigma Nu Auction** at the 63rd Grand Chapter resulted in **\$40,000** for the Foundation.
- Total Foundation assets were more than **\$8.645 million**.
- Parents of Sigma Nu collegians invested **\$10,500** in the Foundation through gifts and pledges.
- Undergraduate giving at Grand Chapter more than doubled, yielding **113** gifts from collegiate members in attendance.
- The Foundation **awarded \$71,165** in scholarships to Sigma Nu members this year and **granted \$1,129,155** to educational areas in collegiate chapter house. The grant to the Fraternity was \$350,000 for an **overall total of \$1,550,320** in grants and scholarships—a **25% increase** over the previous year.
- More than **98% of collegiate chapters** received two consultation visits and consultants trained **3,033 chapter officers**.

Educational Programs Make Great Strides!

LEAD Program Participation:

The LEAD Program experienced a 50% increase in attendance over the previous year.

93 % of Chapters participate in Phase I

67% of Chapters participate in Phase II

27 % of Chapters participate in Phase III

43 % of Chapters participate in Phase IV

69 % of Chapters participate in All Chapter LEAD Programming

LEAD Program Goes Online:

Phases I, II, and IV are available online in an interactive format and Phase III will be completed soon. This is a first in the Greek world! In the first three and a half months, user data for Phase I indicates 682 participants from 154 chapters/colonies.



LEAD Program Wins Awards:

- HRH/Kirklin Fellow Award – 2007-2008 Honorable Mention
- Prevention Excellence Award from Outside the Classroom – 2008-2009 Greek Organization Award Recipient
- Associations Advance America (ASAE) – 2008-2009 Honor Roll

Sigma Nu Institutes:

We experienced a 49% increase in participants and a 29% increase in the number of chapters/colonies represented at the Institutes in 2008-2009 compared to the previous year.

SN Institute	Participants	Chapters	Colonies
2007-2008	247	61	4
2008-2009	368	79	5

College of Chapters:

Participation at College of Chapters has increased each biennium along with growth in other leadership training initiatives. In 2009, there were 158 chapters/colonies represented by 347 attendees at this interactive, hands-on training opportunity held as part of Sigma Nu’s Conclave. Attendance grew by 36% over the previous College of Chapters held in 2007.

**Building Upon the Rock...
Preserving Our Future
Capital Campaign Update**

As a result of generous alumni giving, the *Building Upon the Rock...Preserving Our Future* capital campaign eclipsed the \$10 million mark, reaching 71% of its \$14 million goal prior to the close of fiscal year 2009.

The campaign was conceived out the need to:

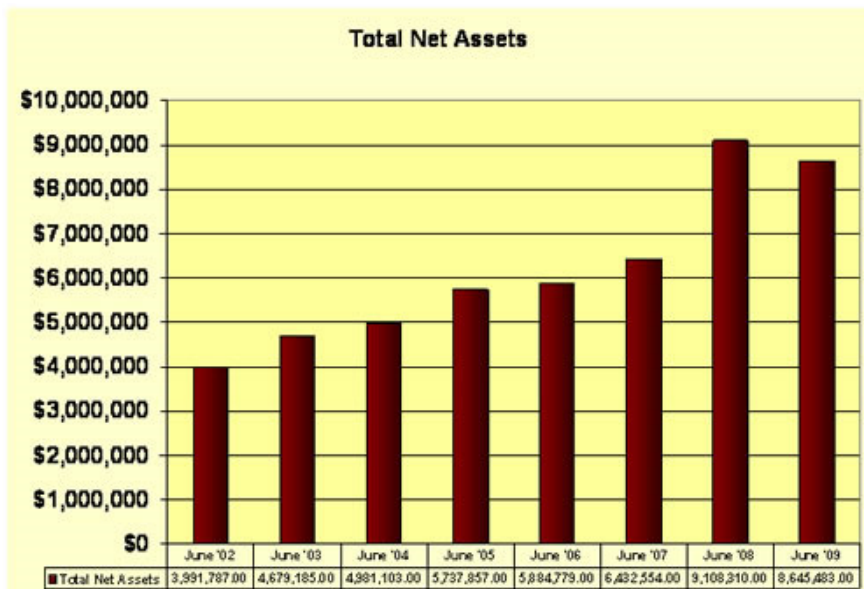
- Provide additional support and programming to our collegiate chapters through the Fraternity’s award-winning LEAD Program,
- Enable our chapters the opportunity for competitive housing,
- Offer academic incentives through scholarships, and
- Invest in the historic preservation of the Headquarters Shrine of Sigma Nu.

Our educational programs are solid, and Sigma Nu alumni believe in them as demonstrated by their giving. With less than \$4 million needed to reach our goal, this outpouring of support will secure a long-term endowment for the Foundation’s top educational and leadership objectives. Funds are designed in the following manner:

- \$1 million for historic preservation
- \$2 million for ongoing programs
- \$6 million for chapter housing and scholarship endowment
- \$5 million for the LEAD member development program

As we strive to reach our \$14 million goal, you can be sure that your support is benefiting the members of your chapter and the Fraternity as a whole.

III. Financial Statement/Graph of Assets



IV. Sigma Nu Educational Foundation Staff

Brad Hastings (West Georgia)

Brad Hastings joined the Headquarters staff in August 2001 as a Leadership Consultant for the Northeast Region. From 2002 through 2006, Brad served the Fraternity in several positions including Director of Chapter Programs and Director of Fraternal Operations. In January 2007, Brad assumed the role of Executive Vice President of the Sigma Nu Educational Foundation. Brad joined Theta Pi Chapter at the University of West Georgia where he served the chapter as Commander and Marshal. Brad has a Bachelor's degree in Human and Organizational Development from Vanderbilt University. In his spare time, he enjoys movies, sports and history.

Russell J. Hammond (James Madison)

Russ Hammond joined the Headquarters staff in 2003 as a Leadership Consultant and traveled the Southeast Region. Since then, he has served as Sigma Nu's Director of Expansion and Director of Expansion and Recruitment. Currently, he serves as a Director of Development for the Sigma Nu Educational Foundation.

A graduate of James Madison University with a degree in Studio Art with a concentration in Industrial Design, Russ held several positions within the Iota Delta Chapter including Commander, Brotherhood Chairman and Risk Reduction Chairman. Outside of his chapter Russ served as Vice President for the Interfraternity Council and as a member of the Greek Week Core Committee. Russ currently lives in his hometown of Charlotte, North Carolina; in his free time he does improv comedy and is training to become a white water rafting river guide.

Joshua Nay (Gettysburg)

Josh Nay joined the Headquarters staff in June 2003 as a Leadership Consultant for the Great Lakes region. In June 2004, he began working for the Sigma Nu Educational Foundation as a Director of Development for the GOLD Program (Graduates of the Last Decade). In February 2007, Josh took a position in the brewing industry where he remained until his return to the Educational Foundation staff in October 2007. He now serves as Director of Development, focusing on chapter campaigns, the annual fund and the Ambassador Program.

An alumnus of Gettysburg College with a degree in Museum Studies, Josh served the Zeta Sigma chapter in a variety of roles including Alumni Relations Chairman and Commander. He currently lives in the Washington, DC area with his wife Kathy and in his free time, serves on the Zeta Sigma House Corporation Board, is active in his Masonic lodge and enjoys homebrewing.

Erik Tomalis (Duquesne)

Erik Tomalis joined the fraternal staff in June 2003 as a Leadership Consultant for the Northeast Region. He worked to engage undergraduate chapters in LEAD and other Sigma Nu educational programs. In August 2004, he transitioned to a position with the Sigma Nu Educational Foundation to focus his attention on developing alumni support for the Fraternity's educational programs. Here, he began a new role as Director of Development for the GOLD Program. Today, he serves the Foundation as a Major Gifts Officer, helping manage chapter campaigns and cultivating prospects to support the LEAD Program.

A graduate of Duquesne University, Erik held many appointed and elected positions as an undergraduate, including Collegiate Grand Councilman for the High Council and two years as IFC President. Erik is an avid sports fan who enjoys cheering on the Pittsburgh Steelers and the Fighting Irish of Notre Dame. He and his wife recently moved to Pittsburgh to be closer to their families.

Jon Sprenger (Drury)

Jon Sprenger joined the Headquarters staff in 2005 and has served as an Expansion and Recruitment Consultant, Director of Recruitment and most recently as the Director of Risk Reduction. He currently serves the Foundation as a Director of Development.

A graduate of Drury University, Jon served his chapter as Commander, Alumni Relations Chairman, Philanthropy Chairman and Intramural Chairman. He was also a member of IFC and the Presidents' Council during his term as Commander. Aside from Sigma Nu, Jon was very active in community service. He graduated with a degree in Exercise and Sports Science with an emphasis in Sports Management and a minor in Business Administration and Global Studies. Jon currently resides in his hometown of Springfield, Missouri.

V. 2008-2009 Foundation Officers and Voting Directors

EXECUTIVE COMMITTEE

William K. (Bill) Stoffer (Albion)

Bill Stoffer joined the Board of the Sigma Nu Educational Foundation in May 2002 and recently completed his term as Chairman. He is Vice Chairman of the Board of Trustees of Albion College, where he has served for more than 25 years. Bill has also received the President's Award from the West Michigan chapter of the National Society of Fund Raising Executives for his service to the people of West Michigan.

Bill is President and CEO of Albion Machine and Tool, where he has worked since 1976. He has a

master's degree in Higher Educational Administration with an emphasis in Law from the University of Northern Colorado. An active volunteer all of his adult life, Bill has served on the boards of numerous professional, community and city-wide organizations including a term as City Councilman and Mayor of Albion, the Albion Chamber of Commerce, City Planning Commission, the Junior Achievement Board (President), Board of Directors of Chemical Bank and Starr Commonwealth Schools (immediate past Chairman and Trustee Emeritus), a multi-state program with campuses for troubled youth.

Robert A (Bob) Gingras (Bowling Green)

Bob Gingras served as Chairman-Elect for the Sigma Nu Educational Foundation; he has served on the Board since 2006. A Fraternity volunteer since 1982, Bob served as Division Commander for sixteen years and on the High Council for four years prior to joining the Foundation Board.

He is the owner of Gingras Management Services, a manufacturer's representative for product lines in the safety industry. He's active in his community with involvement as a Boy Scout Troop Committee Chairman for 6 years, on his homeowner's association board for 7 years, 23 seasons as a youth soccer coach and the past 14 years in Indian Guides. Bob and his wife Terry have two sons, Trevor (20) and Hunter (13).

Craig H. Haesemeyer (Iowa)

Craig Haesemeyer joined the Sigma Nu Educational Foundation Board as a Director in 1997. He has served the Foundation as Secretary (2001-2003), President-Elect (2003-2005), President (2005-2007), Chairman (2007-2009) and recently completed a term as Immediate Past Chairman.

Craig earned his master's degree in business from Harvard University and went on to pursue a career in investment banking in San Francisco. In 1991, Craig founded Transcontinental Capital Partners, a boutique investment banking firm in Palo Alto, California. He is also the principal owner and Chairman of Central State Bank in State Center, Iowa. Craig and his wife Wendy live in Menlo Park, California with their son, Christian.

David C. Ruegg (Berkeley)

David C. Ruegg is Treasurer of the Board of Directors for the Sigma Nu Educational Foundation. He has served on the Foundation Board since 2002. He previously served Sigma Nu Fraternity, Inc. as Division Commander (1984-1987), Vice Regent (1986 - 1988), Regent Elect (1990 - 1992) and Regent (1992 - 1994). In 2006, he was inducted into Sigma Nu's Hall of Honor for his service to the Fraternity.

A Realtor since 1961, David is now a Real Estate Management Investment Consultant and licensed real estate broker. He is a partner of Berkeley, California-based Ruegg & Ellsworth, Vice President and Co-Founder of Karl Kover Kings, Inc. He is an active member of the Berkeley business community and has held board positions for several organizations including the Oakland and Berkeley Boards of Realtors, the California Association of Realtors and the Berkeley Chamber of Commerce where he served as President from 1990-1992. He has also been involved in numerous community organizations including serving as a trustee for Alta Bates Memorial Hospital Foundation, Director of the YMCA, Director of the Berkeley Repertory Theater and member of the Board of Trustees for Head/Royce School. He and his wife Eugenia reside in the Berkeley area and together they have three grown children.

Carl G. Berry (Idaho)

Carl Berry is Secretary of the Board of Directors for the Sigma Nu Educational Foundation. He has served Sigma Nu Fraternity, Inc. as a Division Commander for Northern California and Nevada and, during the 1960s, was on staff with the Fraternity.

Carl has more than 30 years of experience in the development, marketing and sales of shared ownership projects, both timeshares and fractions. He is the CEO of Star Resort Group, headquartered in Scottsdale, Arizona. He is also the founder of the Meritus College Fund, a nonprofit organization providing four-year college scholarships. He serves as a National Board Member of the Lionel Hampton Jazz Festival and is the former President of the University of Idaho Foundation and Alumni Association. He has also been recognized as a member of the University of Idaho Hall of Fame.

Don K. Densborn (Indiana)

Don Densborn currently serves as an At-Large Member of the Board of Directors for the Sigma Nu Educational Foundation after serving a biennium as Regent of Sigma Nu Fraternity, Inc. (2004 - 2006). Prior to his regency, he served on the High Council for six years, as Grand Treasurer and Regent-Elect and as Trustee and Division Commander (Indiana/Illinois).

Don resides in Indianapolis, Indiana where he is engaged in the private practice of law. He is listed in Best Lawyers in America and in Chambers' Leading Lawyers in America for Business. His wife, Kathryn (Gamma Phi Beta), is Executive Director of the Hoosier Lottery. He has two adult children, Peter (Phi Gamma Delta, Purdue) and Elissa (Kappa Delta, Indiana).

Al Wurster (Purdue)

Al Wurster is the most recent addition to the Sigma Nu Educational Foundation Board. He serves as an At-Large Member. Al is President of Wurster Construction Company based in Indianapolis, Indiana. At various times in his life, Al has served Beta Zeta as House Corporation President,

Chapter Advisor and Alumni Chapter Worthy Commander. Al is currently serving as an Ambassador to our capital campaign.

A long-time volunteer for The 500 Festival, a month-long state-wide celebration held each year prior to the Indianapolis 500, Al served 21 years on the Festival board, retiring recently from his position as Chairman. Al and his wife Sally have three children, who range in age from 11 to 18 years old.

VOTING DIRECTORS

James L. Burton (Oklahoma)

James Burton joined the Board of Directors for the Sigma Nu Foundation in 1986. He has served as Secretary (1998-2001) and currently serves as voting Director.

James practiced law in Oklahoma City and New York City and served as an executive in the International Offices of Mobil Oil Corporation worldwide, until retirement. He and his wife live in East Lyme, Connecticut

James C. Cherry (Hampden-Sydney)

James Cherry joined the Board of Directors for the Sigma Nu Educational Foundation in 1994. He served on the High Council (1980 – 1992) and as Regent (1990 – 1992). James was President of the Sigma Nu Educational Foundation from 2001 – 2003. He was inducted into Sigma Nu's Hall of Honor at the 60th Grand Chapter in 2002.

James is a native Virginian with more than 25 years of banking experience. He joined Wachovia Bank in 1974 and is currently the Chief Executive Officer of Mid-Atlantic Banking. His community involvement includes board positions with the Greater Richmond Chamber of Commerce, Greater Richmond Partnership, Metropolitan Richmond Sports Backers, the Virginia Business Council, the Virginia Foundation for Independent Colleges, the Maymount Foundation and the Virginia Bankers Association.

Michael D. Long (Drury/SW Missouri)

Mike Long joined the Executive Committee for the Sigma Nu Educational Foundation in 1996 and served as President from 2003 – 2005. Mike has served Sigma Nu Fraternity, Inc. as Division Commander, Grand Marshall, Vice Regent, Trustee, District Commander, Regent-Elect and Regent. Mike was instrumental in developing The Omega Society, which ultimately resulted in retiring the mortgage of Sigma Nu's headquarters property. In 2005, he was honored as the recipient of the NIC Outstanding Alumni Volunteer Award, and in 2006, he was named to the Sigma Nu Hall of Honor.

Mike is the founder and owner of Goose Creek Publishing in Springfield, Missouri. He is a past board member of the Red Cross, the Boy Scouts and Camp Fire Camp and was a member of the Major Committee for Building Regulations for the City of Springfield. Mike and his wife Cathy divide their time between their city home and their farm on the outskirts of Springfield, where they raise cattle. They have a son Wil (Arkansas) and a daughter Nancy.

Robert L. Marchman, III (Emory)

Robert Marchman has served on the Sigma Nu Educational Foundation Board since 1978, most recently as President (1986 – 2001) and as Chairman (2002 – 2003). He has served Sigma Nu Fraternity, Inc. as Division Commander, on the Member Jurisprudence Committee, as Vice Regent, Regent and Trustee. He was also a member of the Leadership Council (1987 – 1990). In 1992, he served a term as President of the National Interfraternity Conference and was a Board member for the NIC House of Delegates (1984 – 1993).

Robert practiced law in Atlanta for more than forty years and has held the positions of Corporate Secretary and Director of several Atlanta-based corporations. He is now retired in Fort Valley, Georgia, enjoying farming and bird shooting.

C. David Nyman (Southern Utah)

Dave Nyman is a member of the Sigma Nu Educational Foundation Board of Directors as well as the Sigma Nu Headquarters Commission. He previously served the Foundation as Treasurer and the Fraternity as Regent (2002 – 2004), Vice Regent and High Councilman (1998 – 2000), Mountain Division Commander (1987 – 1998) and Chapter Advisor for Lambda Iota Chapter.

In 2003, he retired with the rank of Full Professor from the Music Department at Southern Utah University, where he served on the faculty for 19 years. He also served the university as Assistant Dean of Summer School, Dean of Summer School, Director of Evening/Extended Day Courses, Director of English Language Study Center, Interim Dean of Continuing Education and Professional Studies and Chairman of the Music Department, Coordinator of Fine Arts and Director of Bands. He has received numerous awards for his service to community and professional organizations and has directed more than 20 musicals and operas. He currently resides in Cedar City, Utah.

Daniel Rodriguez (Arizona State)

Dan Rodriguez joined the board of the Sigma Nu Educational Foundation in 1995. He served as an At-Large Member of the Executive Committee (2005 – 2007) and currently serves as a Voting Director. He is a former Fraternity staff member, having worked three years as Associate Executive Director. He has also served as an Advisor for the Zeta Upsilon Chapter, Division Commander (1984 – 1988), Grand Sentinel (1989 – 1994), Vice Regent (1990 – 1994), Board of

Trustees (1994 – 1996), Regent-Elect (1996 – 1998) and Regent (1998 – 2000).

Dan has worked for the last 20 years as the Associate Vice President for Alumni Affairs and Executive Director of the University of Oregon Alumni Association. He has a B.S. in Business Administration and Marketing from Arizona State University and has MBA graduate course work at the University of Santa Clara. Dan and his wife Carol Ann live in Eugene, Oregon.

Joseph F. Wood (Oregon State)

Joseph Wood joined the Board of the Sigma Nu Educational Foundation in 2001 after serving as a Trustee of Sigma Nu Fraternity, Inc. He also currently serves as Chairman of the Board of Managers for Fifth Point Properties, LLC.

Joseph is the Executive Vice President and partner of Norris Beggs & Simpson, a commercial real estate service firm offering brokerage, property management, consulting and mortgage lending services throughout the Pacific Northwest. He also serves on the board of NBS Real Estate Capital, a pooled real estate investment fund. He and his wife Peggy live in Portland, Oregon.

VI. Giving

Chapter Educational Funds and Chapter Scholarship Accounts

Did you know you can make tax-deductible contributions to the Foundation to be deposited in a Chapter Educational Fund or Chapter Scholarship Account, earmarked specifically for your chapter? Funds may be utilized by chapter members for attendance at Conclave or LEAD events, chapter scholarships or other educational needs.



Regent Joe Gilman (Morehead State) and Executive Director Brad Beacham (Texas Christian) talk with collegians during the Sigma Nu Institute in Lexington last spring.

As contributions are received, they are placed into an account in the chapter's name. To maintain an account, the balance must reach \$10,000 within five years from the date of establishment. The first scholarship or grant will be awarded in the fiscal year after contributions totaling \$10,000 or more have been made. Currently, more than 75 chapters maintain an account. Lists can be found on the Sigma Nu website:

[Chapter Scholarship Accounts](#)

[Chapter Educational Funds](#)

Chapters or alumni members who wish to establish a Chapter Educational Fund and/or a Chapter Scholarship Account may contact [Brad Hasting](#) at the Educational Foundation.

WAYS TO GIVE

Tax-Deductible Giving

The Sigma Nu Educational Foundation is a 501(c)(3) organization and contributions are tax-deductible to the extent allowed by law. Alumni and friends of Sigma Nu choose to support the Sigma Nu Educational Foundation in numerous ways. Outright gifts and pledges provide more immediate funding for the current needs of the Foundation. Deferred gifts are useful for financial and estate planning. You may indicate whether your gift is for immediate use or to establish a permanently endowed fund. Gifts may be either unrestricted or restricted for a specific purpose.

Gifts of Cash

Donors make gifts of cash the Sigma Nu Annual Giving Fund via cash, personal check, credit card, money order or bank draft. Thousands of generous alumni choose to support the Educational Foundation each year in this manner.

A Five-Year Pledge

While donors are encouraged to provide early and generous support, donations may be made over a five-year pledge period. The Foundation will send payment reminders each year. In addition, donors who make a total five-year pledge of at least \$5,000 are eligible for membership in the 1869 Founders Circle.

Gifts of Stock

Some donors may find that they are able to enhance their giving capability by making a donation of appreciated securities. Donations of appreciated stock often provide significant tax advantages to the donor through avoidance of capital gains tax and a charitable income tax deduction for the full market value of the stock at the time of the gift. Donors interested in this method of giving should consult their tax or investment advisor. The Foundation can help facilitate your stock donation.

Matching Gifts

Many companies encourage charitable giving by matching employee contributions to public charities. Your generous support of the Educational Foundation can go even further with a matching

gift from your employer, and you, as the employee, receive credit for the gift.

Honorary and Memorial Gifts

For a unique and fitting tribute to a friend or loved one, consider a gift to the Foundation *in honor* or *in memory*. To make a commemorative gift, please include the following information with your contribution: name and chapter of honoree; name and address of family to which the acknowledgment will be sent; your name, address, chapter, phone number and any message you might want to include. The Foundation staff will forward notes to the family or honoree as requested in your contribution.

Planned Gifts

If you cannot make the significant gift that you would like to make with cash or appreciated securities today, another option to consider is an estate planned gift. Many alumni have determined that a planned gift allows them to make a significant gift to Sigma Nu without interrupting current personal cash flow needs. Such gifts can provide significant tax benefits as well as lifetime income for you and your family.

A bequest, paid-up life insurance policy, charitable gift annuity, charitable remainder trust, charitable lead trust or naming the Sigma Nu Educational Foundation as a beneficiary of a 401K plan are just a few examples of planned gifts. Deferred or planned gifts enable you to help meet Sigma Nu's needs for the future and your personal financial needs today.

VII. Planned Giving, Giving Societies & Donor Listing

The Yates Legacy Society

Most people are familiar with the poem "The Bridge Builder." This timeless poem tells the story of a man who builds a bridge, not for himself, but for generations to come. Sigma Nu is fortunate to have had such a builder in William P. "Bud" Yates (Beta Rho/Pennsylvania), who made a bequest to Sigma Nu in 1945. Brother Yates left three-quarters of his estate to Sigma Nu, resulting in the formation of the Sigma Nu Educational Foundation, Inc. To salute Brother Yates for his vision and generosity, The Yates Legacy Society was established in 2000.

The Yates Legacy Society includes those individuals who have designated the Sigma Nu Educational Foundation in their estate plans through bequests, life insurance, trusts or another documented planned gift arrangement. To date, over 100 Brothers and/or their spouses have realized the tremendous benefits of making a planned gift to the Sigma Nu Educational Foundation.

The Yates Legacy Society Members

Anonymous
Margaret C. Davis
Mary Gorman
Amanda Koerth
William B. Oakley (Alabama)
* Durelle C. Lane (Albion)
William K. Stoffer (Albion)
Daniel Rodriguez (Arizona State)
* Robert N. (Bob) Maddox (Arkansas)
Evelyn C. (Mrs. John F.) Steen (Bethany)
Robert A. Gingras (Bowling Green)
Charles H. Weyhenmeyer, Jr. (Bradley)
* Howard H. and Margaret A. Braverman (Brown)
* W. Selden Steiger (Brown)
John D. Davies (Butler)
* Walter T. Smith (Butler)
James H. Reiman (Case Western)
James A. Owens (College of Charleston)
Gerald J. J. Starika (Colorado)
* William S. Smith (Colorado School of Mines)
James D. McCracken (Drury)
Michael D. Long (Drury/Missouri State)
Robert L. Marchman, III (Emory)
* James D. and Teresa M. Wright (Florida)
Don K. Martin (Georgia State)
James C. Cherry (Hampden-Sydney)
E. G. White (Indiana)
* Herman B. Wells (Indiana)
Craig H. Haesemeyer (Iowa)
David C. Underwood (Kansas State)
Richard W. and Ann T. Dodderidge (Kansas State)
Scott L. Dingle (Kentucky)
Austin S. and Tina O. Landry (La. Lafayette/Birmingham-Southern)
Lomax Napper (Louisiana Tech)
Maurice E. Littlefield (Maine)
* Richard W. Averill (Maryland)
* Robert A. Webster, Jr. (Maryland)
* James E. Miles (Mercer)

Michael D. Osterhout (Mercer)
* Charles L. Short (Miami/Ohio)
* Edward M. Roberts (Miami/Ohio)
Joseph A. Weber, Jr. (Michigan State)
Samuel E. Williams (Michigan State)
* J. Paul Scheetz (Missouri)
Joseph M. Gilman (Morehead)
Randall L. Ward (N.C. State)
William W. Palmer (Norwich)
Gavin R. Larrimer (Ohio State)
* Raymond W. Klink (Ohio State)
* Charles Mavity (Oklahoma State)
Douglas A. Benson (Oregon)
Wayne H. Gillis (Samford)
* Arthur B. Chitty, Jr. (Sewanee) Harris E. Yarbrough, III (Southern Methodist)
Thomas R. Panko (Southern Miss./LSU)
* Fred R. Wittnebert (Stevens Institute of Technology)
Don C. Fancher (Tennessee)
* Lee A. and Reba Goins Absher (Tennessee)
* Irvin K. and Frances G. Garrett (UCLA)
Gerald R. Sherratt (Utah State)
* Arthur B. Rupert (Vermont)
E. Thomas Eggert, II (Vermont)
Oliver G. Ludwig (Villanova)
Richard M. Marcks (Virginia)
David W. Stockmeier (Virginia Wesleyan)
* Joseph G. Cutler (Washington)
Brent C. Sobol (Washington in St. Louis)
* Willis W. Stevenson (Western Reserve)
George E. Holy (Westminster)

* Deceased

If you are planning to include or have already included Sigma Nu in your estate plans, please be sure to notify the Foundation so that we may recognize you as a member of The Yates Legacy Society.

GIVING SOCIETIES

Cumulative giving societies and annual giving clubs have been established to recognize the generosity of the Foundation's most loyal donors:

Annual Giving Clubs:

Honor Roll \$1.00 – \$99.00
Century Club \$100.00 – \$249.00
White Star Club \$250.00 – \$499.00
Order of Knights \$500.00 – \$999.00
Founders Club \$1,000.00 – \$2,499.00
1869 Founders Circle \$1,000.00/year or higher with a 5 year commitment
Presidents Club \$2,500.00 – \$4,999.00
21st Century Club \$5,000.00 – higher

Cumulative Giving Societies

The Legion of Honor Society recognizes lifetime cumulative donations between \$5,000 and \$9,999.

The Sword Society recognizes lifetime cumulative donations between \$10,000 and \$24,999.

The Shield Society recognizes lifetime cumulative donations between \$25,000 and \$99,999.

The Rock Society recognizes lifetime cumulative donations between \$100,000 and \$249,999.

The Rose Society recognizes lifetime cumulative donations between \$250,000 and \$499,999.

The Benefactors Society recognizes lifetime cumulative donations between \$500,000 and \$999,999.

The Founder's Society recognizes lifetime cumulative donations of \$1,000,000 or more.

Donor Listing –

For a complete list of 2008-2009 donors, please visit the [Sigma Nu website](#).

Opens to a PDF page – for the list of donors. [I still need to do some formatting on the list and turn it into a PDF.]

VIII. Educational Programs

Excellence Through Education is the Fraternity's highest priority as determined by its Board of Directors. It is within the Fraternity's educational programs and services that our mission may be achieved. Through these programs, the mind, heart and character of our members are developed; ethical leaders are inspired by the principles of Love, Honor and Truth; and Brothers form relationships that will last a lifetime.



Director of Alumni and Volunteer Programs Todd Denson (Nicholls State) facilitates a discussion for chapter advisors and other alumni volunteers.

Thanks to generous contributions from loyal alumni, Sigma Nu's educational programming made great strides this year. Undergraduate participation increased, the LEAD Program received several prestigious awards and the effectiveness of LEAD continues to be demonstrated through participant survey responses.

Each of us has benefited from our membership in Sigma Nu. Your investment in these efforts through financial gifts to the Sigma Nu Educational Foundation helps ensure that future generations also have the opportunity to benefit from the exceptional leadership training offered by Sigma Nu Fraternity.

College of Chapters

An interactive experience that focuses on leadership, teambuilding and the core principles of Sigma Nu, the College of Chapters is designed to prepare our collegiate Brothers to be catalysts for change in their chapters and campus communities. During the biennial four-day event, held this year from June 27th – July 1st, Brothers learn about themselves as leaders, connect with Sigma Nus from chapters and colonies across the country and find solutions to personal challenges and those facing their chapters. College of Chapters is based heavily on the LEAD curriculum and is designed to ensure that participants "*learn by doing.*" Two (2) representatives from each chapter and four (4) from each colony are required to attend the program, which is held on the campuses of Washington and Lee University and Virginia Military Institute. Chapters may send more delegates if they choose. Typically between 300 to 400 Brothers attend.

LEAD Program

PHASE 1 – CANDIDATES:

93% of Chapters Participate – Now available in an online interactive format!

Designed to give our Candidate members the knowledge and skills they need to become good active Brothers in the chapter, Phase I consists of 10 sessions—and 2 optional sessions (Community Service and Time Management)—to be completed during Candidate Education. The flexibility of the LEAD Program allows chapters to include their own educational components in the program such as chapter history, community service and philanthropy.



Sigma Nu Educational Foundation Chairman-Elect Bob Gingras (Bowling Green) facilitates a discussion for alumni volunteers in the LEAD Classroom. From left, Sy Hughes (Lander); Todd Denson (Nicholls State); Psi Alumni Advisory Board Chairman Hank Pownell (Minnesota).

PHASE 2 – 2nd YEAR MEMBERS (SOPHOMORES):

67% of Chapters Participate – Now available in an online interactive format!

Phase II is designed for second year chapter members. Typically, these are sophomores who have not yet held a position in the chapter. Phase II is designed to give these young Brothers the skills and training they need to become good leaders and officers within the chapter. This is the most critical phase of the LEAD Program where our members learn effective leadership techniques, find their voice in the chapter and are encouraged to get involved and take ownership for the chapter. The sessions are designed to encourage second year members to work together and grow as individuals.

PHASE 3 – 3rd YEAR MEMBERS (JUNIORS):

27% of Chapters Participate – Will soon be available in an online interactive format!

Phase III was created with the active brother in mind, specifically third year members who are already involved on campus and in the community. Phase III is a self-directed program with a "leadership lab" approach, where participants apply what they have learned in LEAD to real life situations. It is an excellent opportunity for Brothers to gain life skills through any of the seven modules, including: Personal Development, Career Development, Change, Problem Solving, Organizational Development, Ethics and Social Change. Participants decide how they are going to learn more about each topic by selecting a specific project to complete. An alumnus or faculty/staff member serves as the LEAD Coach to provide support and meet with the group once a month to discuss their successes and challenges.

PHASE 4 – GRADUATING SENIORS:

43% of Chapters Participate – Now available in an online interactive format!

Phase IV is the capstone leadership program for Sigma Nu designed specifically for seniors approaching graduation. The focus for Phase IV is on life skills and leadership—areas that will help them be successful in their next step after college. Some of the sessions include: Networking, How to Evaluate Salary Offers, Success Tips for the First Year on the Job, Servant Leadership, Managing Money after Graduation and How to Deal with Conflict. The program provides graduating seniors the opportunity to mentor younger Brothers and assist with facilitating a chapter retreat or specific Phase I and II sessions. Phase IV helps senior Brothers take a positive role during their last year and prepare for the transition between college and their next journey in life.

ALL CHAPTER:

69% of Chapters Participate

All Chapter LEAD Programming is organized into three modules and designed for participation of the entire chapter. . Module A is focused on *Personal Development* of the individual member. Some of the sessions include: Scholarship, Fitness/Wellness, Spirituality and Stress Management.

Module B is focused on *Organizational Development*, specifically for Executive Board Members and others who wish to work toward improving their chapter. Some of the sessions in Module B are: Goal Setting, Strategic Planning, How to Run Effective Meetings, Delegation, Accountability, Diversity and Officer Transition.

Module C focuses on *Risk Reduction*. The sessions in Module C will help Brothers create a safe environment in which to live; the topics include Fire Safety, Crisis Management and Substance Abuse.

AlcoholEdu for Chapters Becomes GreekLifeEdu

In 2008, AlcoholEdu—the nation’s first online alcohol misuse and abuse prevention program —became GreekLifeEdu, designed specifically for Greek students and focused on the prevention of alcohol abuse, hazing and sexual assault. Today, the program is used on more than 450 college and university campuses nationwide to create a learning experience for students that:

- Motivates behavior change
- Resets unrealistic expectations about the effects of alcohol
- Links choices about drinking to academic and personal success
- Helps students practice healthier and safer decision-making

GreekLifeEdu is available online, free of charge, to all undergraduate members. More than 1,750 Sigma Nu members, primarily Candidates who were exposed to GreekLifeEdu as part of their Phase I curriculum, participated in the program last year. This number represents participation of at least one member from 71 of Sigma Nu’s undergraduate chapters.

Helping Hand Initiative – Sigma Nu’s Community Service Initiative

The Helping Hand Initiative was implemented to organize and direct the philanthropic and community service activities of chapters and members in support of three charitable partner organizations (St. Jude Children’s Research Hospital, Habitat for Humanity and CHARACTER COUNTS!). Chapters are encouraged to plan philanthropic activities simultaneously around the country during Sigma Nu’s Founders’ Month of Service (the entire month of April) in order to maximize exposure.

Chapter participation in the Initiative is strictly voluntary and last year increased from 37 to 44 chapters —the greatest number of participating chapters since its inception. Chapters donated more than \$127,000 and 1,870 hours to charitable organizations. Since the program began five years ago, more than \$701,000 has been raised for charitable organizations.

Sigma Nu Institute

The Sigma Nu Institute is the Fraternity’s officer training initiative, which was first implemented as a pilot program in January 2006. Twenty-four Commanders from chapters across North America were invited to take part in the inaugural program held at the Fraternity’s Headquarters in Lexington, Virginia.



Participants exchange ideas between sessions during the Sigma Nu Institute in Lexington.

The pilot program was so successful that the Institutes were implemented regionally in January 2008. This year eight (8) regional Institutes were held across the country during January and February to assist with officer training and transition specifically for chapter

Commanders, Lt. Commanders, Marshals, LEAD Chairmen, Recruitment Chairmen and their corresponding alumni volunteers. More than 365 students attended this year, which is almost a 50% increase from the previous year, and 84 collegiate chapters and colonies were in attendance compared to the previous year’s 65 that attended (a 30% increase).

As a 501(c)(3) charitable foundation, the Sigma Nu Educational Foundation, Inc. (Tax ID#54-6035735) provides you with numerous opportunities to positively impact both your current

and future tax liabilities, and the future of Sigma Nu as well. Thank you for your consideration and support of this worthwhile endeavor.

The Creed of Sigma Nu

To believe in the life of love,
To walk in the way of honor,
To serve in the light of truth,
This is the life, the way and the light of Sigma Nu,
This is the creed of my fraternity.

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