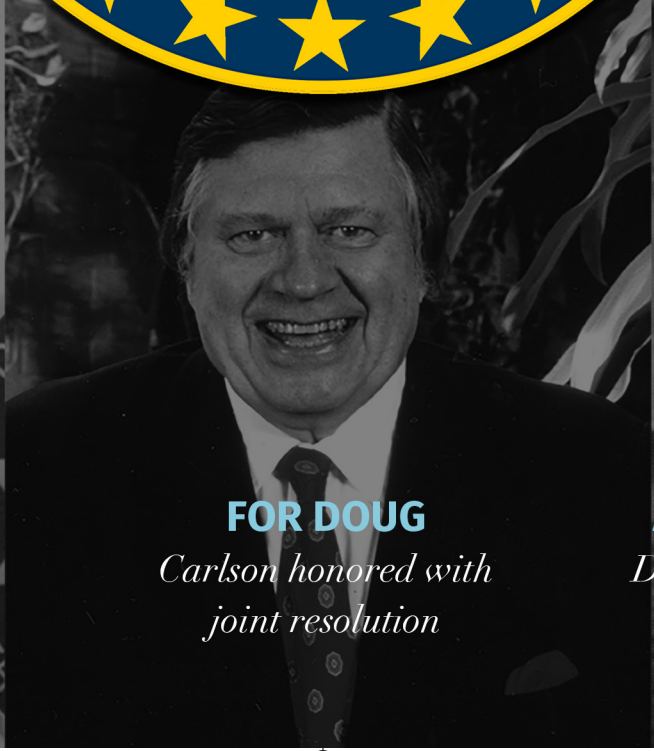
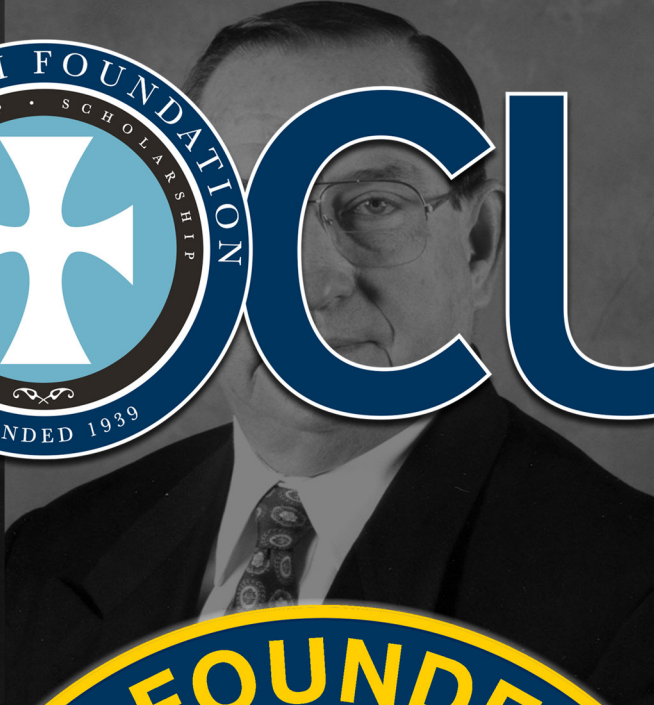


FOCUS



OUR FUTURE
*Sigma Chi unveils
"One Voice" vision*

FOR DOUG
*Carlson honored with
joint resolution*

ALUMNI EFFECT
*Distinguished Visitors
impact undergrads*



Executive Editor
Wes Holtsclaw
EAST TENNESSEE 2012

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DID YOU KNOW

Thanks to the support of brothers like you, the Sigma Chi Foundation will provide a 15% increase in academic scholarships and 26% growth in leadership and educational programs during the 2017-18 fiscal year.

SIGMA CHI FOUNDATION UPDATE

New strategic plan details include growth of endowment, funding

- Record support of Fraternity leadership, educational programs in FY 2017-18

Brothers:

You have helped make Sigma Chi the biggest and most successful Fraternity it has ever been. On behalf of your Sigma Chi Foundation, thank you.

It is the cause and the outcome of the work that you do, in part made possible by the Foundation, which emboldens our role that supports the leadership and scholarship needs of Sigma Chi.

One year ago, I shared the progress that had been made in developing a joint Sigma Chi Fraternity and Foundation program plan. We had a clear roadmap of what we all hoped to expand or create.

In June, during Grand Chapter in Providence, Rhode Island, I was pleased to report that the spirit of partnership between the Fraternity and Foundation has allowed us to work together in developing a single updated Sigma Chi vision for our next decade and mission statements that define roles for success (learn more about this on page 5).

I am proud to lead your Foundation as it carries forward its Sigma Chi role — our development mission — to secure financial resources and provide faithful stewardship in support of Sigma Chi.

We are one Sigma Chi, one vision, one set of strategies, and we will succeed.

Our joint plan calls for significant growth in funding for our programs and we are well into our way of accelerating our fundraising efforts to fully support these aspirations. In the coming year, this

Metric	FY 16-17	FY 17-18		2020 TARGETS (Benchmark)
	Forecast	Strategic Plan	Base Budget	
Gift Yield	.72	.75	.75	.75 (.80 (.81 ASU))
Fundraising Expense	.21	.18	.20	.18 (<.35 BBB)
Program Expense	.66	.69	.69	.67 (>.65 BBB)
Cost Efficiency	.36	.33	.33	.31 (.28 (.20 ASU))

equals a 15% increase in academic scholarships and an incredible 26% growth in leadership and educational programs — much invested to accelerate Sigma Chi University, expand our regionalized chapter support coordinators, and invest in strategic plan priorities such as a learning continuum and “one voice” messaging.

These investments are vital to moving towards our vision and will take the scope of our direct undergraduate reach from about 15% to touching every single undergraduate, every year.

I am thankful to the volunteers and many staff professionals who will work hard over the coming months to develop and implement these initiatives.

INDUSTRY-BEST METRICS

Two years ago, we adopted four industry-best metrics and five-year targets that will place our Foundation on par with great universities. A first-rate Foundation must measure its self against other world-class

organizations and, if we come up short, take the steps necessary to improve.

- Gift Yield = % of CONTRIBUTIONS that goes to mission or is set aside
o (Grants, Scholarships + Margin / Contributions)
- Fundraising Expense = Cost per \$1 Raised
o (IRS Form 990 “Fundraising Expense” / Contributions)
- Program Expenses = % of Expense for Program Services
o (IRS Form 990 “Program Services” / Expense)
- Cost Efficiency = % of total annual revenue going to operating expense
o (Operations + Fundraising + HQ Expense / Revenue)

As you can see in the chart above, our metrics focus on how much of our revenue goes to our mission. They are influenced by three variables: how much we raise, our operating cost, and how



“My brothers, I cannot fully express this feeling of joy through typed words, but I can tell you this will help with my education. My life quest is to become a Doctor for the United States Military. I need the proper education, experiences and resources to get me started for Medical School. This award has provided me with all of that.”

JESUS HERNANDEZ, THE COLLEGE OF IDAHO
MILITARY SERVICE SCHOLARSHIP

2 ■ SIGMA CHI FOUNDATION FOCUS

much we spend on our mission or set aside for the future.

Looking specifically at our performance, last year, we made dramatic progress towards our metrics. As you will see, we expect to finish the current year strong and at a modern high-water point for our Foundation. More significantly, next year's plan places us about a year ahead of expected progress towards our five-year targets.

A key factor in achieving all of our goals is funds raised. With some exceptions, we are organized like a university development office. Building on the infrastructure put in place over the past decade, we have made some enhancements over the past two years that are showing great promise — including our focus on top-level prospects, local receptions, and planned giving.

LOOKING FORWARD

About eight years ago, the leadership of our Foundation and Fraternity both clearly recognized the need to build a real endowment and program reserves — and we have made great strides since that point.

In addition, we have made a mighty good start in securing known planned gifts — which, by definition, help secure our future.

As part of our joint strategic plan, we established a \$100 million reserve goal over the next ten years. We are about 50% towards this goal, with \$27 million in booked assets and \$24 million in known planned gifts that are not reflected on our audited financial statement. I expect the next 50% will be more heavily oriented towards planned gifts.

Why is planned giving so important? A planned gift is a simple and near painless way for any of us to create a legacy for the

future. While no one wants to consider the chapter eternal, at any age, planned giving is empowering and, because we recognize every brother who lets us know of his intent, it's a way to be recognized today for your future impact.

With an eye toward our future, and thanks to the support of our donors in fiscal year 2016-17, we will provide a record \$2.5 million in support to Sigma Chi during this new 2017-18 cycle.

These gains include growth in leadership programs within Sigma Chi U and expanded support to our undergraduate chapters.

This fall, we will also provide a record \$478,000 in academic scholarships to undergraduate and graduate brothers — an increase of \$61,000 from one year ago.

None of these things would be possible without your support of our vision. We appreciate all you do for Sigma Chi.

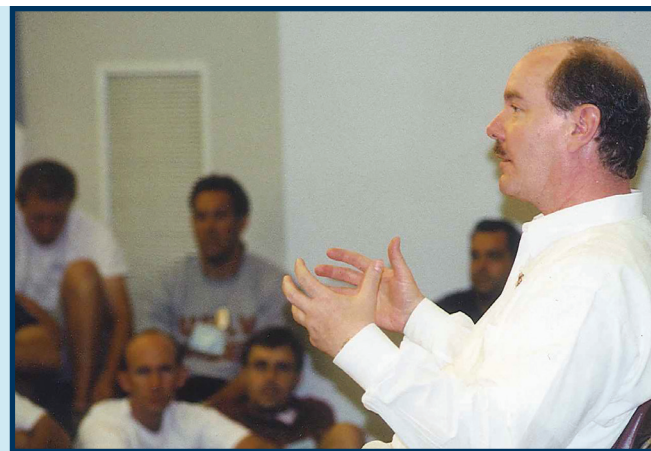


Ashley Woods, **EAST TENNESSEE 2000**
Sigma Chi Foundation President & CEO



“Being chosen as one of the 2016 Sigma Chi Foundation Scholarship recipients was not only a blessing, but assisted me with my college expenses. To me, this scholarship was a token of appreciation from my new found brotherhood. I am honored and grateful to represent Sigma Chi as one of its scholarship recipients.”

NICK SHAFER, ARKANSAS STATE UNIVERSITY
BELL CHAPTER CHALLENGE SCHOLARSHIP



Joint resolution honors life and work of Carlson

Future archival center; leadership award named for 62nd Grand Consul

From his initiation into the Alpha Sigma Chapter of Sigma Chi on April 25, 1970, 62nd Grand Consul Douglas R. Carlson, **MINNESOTA 1973**, demonstrated the kind of servant leadership that has inspired generations of Sigma Chi.

In early July, the Fraternity and Foundation issued a joint resolution in honor of Carlson's 47 years of service to Sigma Chi with the unveiling of the Douglas R. Carlson Principled Leader Award and the future establishment of the Douglas R. Carlson Sigma Chi Fraternity Archives and Center for Advanced Study.

As an active brother and alumni, Carlson held numerous offices and volunteer roles including 18 years as the 19th Grand Historian — the longest-serving member to hold the office — and later as the Grand Pro Consul and 62nd Grand Consul.

His dedication to Sigma Chi's history, heritage and principles led to his authoring of the 1990 publication of *The History of the Sigma Chi Fraternity, 1955-1980* and the first authoritative summary of Sigma Chi's teachings entitled, “The Ritual, a Historical Perspective,” which has been published in every Ritual book since its completion.

He has been honored as a Significant Sig, a member of the Sigma Chi Hall of Fame, a member of the Order of Constantine and as an inaugural member of the Founders' Circle.

The Carlson Principled Leader Award will be bestowed annually upon the undergraduate and alumni member who have best exemplified Sigma Chi's principles through their acts of selfless and impactful leadership with the undergraduate member receiving a \$1,000 scholarship and the alumni member receiving \$1,000 to be donated to the charity of his choice.

The future Carlson Sigma Chi Fraternity Archives and Center for Advanced Study will honor his devotion to Sigma Chi's history and principles. Funds raised will contribute towards the construction of a permanent facility which will host a grand repository, processing and cataloging space and workspace for archivists and volunteers.

To learn more or to donate towards these efforts, visit sigmachi.org/carlson.

81st GRAND CHAPTER



Sigma Chi's 69th Grand Consul Michael Ursillo, **BROWN 1978** (center), and Sigma Chi Foundation President & CEO Ashley Woods, **EAST TENNESSEE 2000** (far left), introduced the inaugural class of Founders' Circle award recipients, honoring those brothers who have dedicated a significant volunteer presence and monetary contributions towards the betterment of Sigma Chi, during the inaugural Celebration of Giving Back during Sigma Chi's 81st Grand Chapter.

A Perfect Circle

Fraternity, Foundation salute alumni who give back;
debut new joint recognition award

PROVIDENCE, R.I. — The volunteer efforts and financial support of those who devote their talents and gifts to Sigma Chi were fittingly honored in a first-of-its-kind collaborative event between the Fraternity and Foundation during the 81st Grand Chapter in June.

The Celebration of Giving Back luncheon highlighted those who pay it forward in all facets with the presentation of the Fraternity volunteer awards, including the Seven Lights Alumni Award that honors alumni who have demonstrated significant service to the Fraternity, as well as the Sigma Chi Foundation's William Lewis Lockwood Society which recognizes brothers who have provided a cumulative lifetime giving of \$100,000 or more to support Sigma Chi's leadership program and scholarship efforts.

Perhaps most fitting was the unveiling of a new recognition society, the Sigma Chi Founders' Circle, to salute brothers who have given back to the Fraternity



Sigma Chi Foundation board member, Order of Constantine and Significant Sig Jeff Muir, **GEORGIA 1971**, recognized Lockwood Society honorees during the Giving Back luncheon.

throughout the duration of their lives, while leaving a legacy for Sigma Chi's future.

Founders' Circle recognition was placed upon those who have achieved three significant milestones within Sigma Chi through volunteerism and monetary contributions:

- Induction into the Order of Constantine, the Fraternity's highest honor that recognizes alumni with years of service to Sigma Chi at the international, provincial, undergraduate and alumni chapter levels.
- Entry into the Foundation's William Lewis Lockwood Society
- Membership in the Foundation's James Parks Caldwell Society, which recognizes brothers and friends who have named the Sigma Chi Foundation as a beneficiary of a planned gift, such as a will, trust, retirement plan or life insurance policy.

The inaugural 21 honorees included a vast array of

significance within Sigma Chi's history including eight Grand Consuls and two Foundation board chairmen, with five brothers recognized posthumously.

INAUGURAL HONOREES

63rd Grand Consul Lee Beauchamp, **TEXAS A&M-COLLEGE STATION 1975**

62nd Grand Consul Doug Carlson, **MINNESOTA 1973**

Bob Georges, **FLORIDA SOUTHERN 1973**

68th Grand Consul Mike Greenberg, **ILLINOIS WESLEYAN 1982**

Jeff Greene, **WYOMING 1975**

Bob Hayden, **MIAMI (OHIO) 1960**

59th Grand Consul Dick Hester, **BALL STATE 1977**

James Huber, **WISCONSIN 1960**

64th Grand Consul Keith Krach, **PURDUE 1979**

Steve Loudin, **IOWA STATE 1980**

58th Grand Consul Murray McComas, **PENNSYLVANIA 1958**

50th Grand Consul Jack McDuff, **ARIZONA 1951**

Leon Parma, **SAN DIEGO STATE 1951**

Past FDN Chairman John Peterson, **INDIANA 1955**

43rd Grand Consul Chuck Thatcher, PH.D., **MICHIGAN 1943**

Past FDN Chairman Chuck Watson, **OKLAHOMA STATE 1972**

Chapter Eternal

Kenneth "Bud" Adams Jr., **KANSAS 1944**

James Dora Sr., **PURDUE 1958**

Ben Fisher, **ILLINOIS 1948**

Ken King, **NORTHWESTERN 1922**

George Mayer, **CINCINNATI 1939**



Top: Sigma Chi Foundation Chairman Bob Johnson, **MIAMI (OHIO) 1969** (right), and Vice Chairman Joe Durzo, **SYRACUSE 1967**, presented Lockwood Society recognition gifts to new honorees present, including Order of Constantine Sig Bill Sapoch, **DICKINSON 1984** (center). Below: Members of the 2017 Significant Sig class participated in a Foundation-led roundtable discussion.

ONE VOICE

SIGMA CHI INTERNATIONAL FRATERNITY | SIGMA CHI FOUNDATION

Joint strategic plan defines vision, missions for Fraternity, Foundation

The leaders of Sigma Chi Fraternity and Foundation gathered this past fall to consider our direction for the next decade and quickly recognized the need to define one future for our great Fraternity and to ultimately speak with One Voice.

We are proud of the outcomes of this effort:

- (1) a single Sigma Chi vision,
- (2) missions for both the General Fraternity and Foundation that define roles in achieving our vision (one operational and one development),
- (3) a set of strategies and related goals that will propel us to success over the next decade, and
- (4) an accountability structure to track our progress and adapt as needed.

We are one Sigma Chi, one vision, one set of aspirations.

Our process involved broad representation from both the Fraternity Executive Committee and Foundation Board of Governors who engaged in several full group working sessions, sub-group efforts, and multiple stakeholder reviews.

After many months of work, the plan was unanimously approved during an historic joint meeting of the Fraternity Executive Committee and Foundation Board of Governors.

We are one Sigma Chi with a clear path forward.

We are grateful for the many leaders who joined us in this effort, including: Brothers Kim Caldwell, Joe Durzo, John Forst, Tommy Geddings, Bob Georges, Jeff Gill, Steve Goodroe, Mike Greenberg, Joe Martin, Tim Sanderson, Steve Schmidt, Steve Schuyler, Ed Spencer, and Dan Walsh. We are also grateful for the unanimous support of our current leadership boards.

The real work lies ahead and, as one Sigma Chi, we are committed to the focus and effort required to succeed. We know that three things will be essential: time and effort from dedicated volunteers, financial support from our Brothers, and an ongoing commitment to our plan.

With your support, we look forward to implementing our vision of One Sigma Chi in the coming months.

In hoc,

Mike Ursillo, 69th Grand Consul
 Bob Johnson, Foundation Chairman
 Mike Church, Fraternity Executive Director
 Ashley Woods, Foundation President & CEO

VISION:
 To be the preeminent leadership and character development brotherhood benefiting our members throughout life.

OPERATIONAL MISSION:
 To develop values-based leaders committed to the betterment of character, campus, and community.

DEVELOPMENT MISSION:
 To secure financial resources and provide faithful stewardship in support of Sigma Chi.

PLANNED GIVING

Gifts make a lasting impact

One of the most enduring ways a brother or friend can demonstrate support for the Fraternity is by making a planned gift in support of Sigma Chi.

Planned gifts provide direct financial support to the Foundation upon a donor's passing, funding important initiatives and allowing a donor to leave a lasting impact.

Over 250 brothers presently have included gifts to benefit Sigma Chi's values-based leadership programming and academic scholarship efforts in their futures through planned gifts, including 48th Grand Consul Dr. Charles M. Thatcher, **MICHIGAN 1943**.

"I have supported the Sigma Chi Foundation annually for many years, believing in its mission to provide funding for scholarships and leadership programming for our undergraduate brothers," Thatcher said. "It made a lot of sense to me to also include the Foundation in my estate plans to continue my support for their good work.

"Sigma Chi has provided me with many blessings and my gift through my estate will help ensure its future. I encourage all brothers to do the same."

There are many different ways to give back to Sigma Chi through a planned gift with the Sigma Chi Foundation:

INCLUDE SIGMA CHI IN YOUR WILL

A Bequest is a gift of personal property in any amount or form made to Sigma Chi through a donor's will and, unless expressly restricted, will support leadership development and scholarship opportunities for our undergraduate members and help us grow the endowment.



Photo contributed

48th Grand Consul Chuck Thatcher, **MICHIGAN 1943**, is among over 250 brothers to include Sigma Chi in their estate plans.

Bequests may be specific, such as a dollar amount in cash, identified securities, or listed articles of tangible personal property. Bequests can also be general, such as a percentage of the residue of the estate. Once you have prepared your will, we ask that you provide a copy to the foundation for our records. Please know that we treat this as strictly confidential information.

INSURE SIGMA CHI'S FUTURE

Gifts of life insurance are a way to leverage your support of the foundation to support the values-based leadership programs of Sigma Chi into the future. There are several options to provide this type of gift. If you choose to name the foundation as a beneficiary,

you would continue to make premium payments to your insurance company.

You can also choose to make the foundation the owner of the policy and make tax-deductible gifts to the foundation to pay the premiums. Upon payment of the policy, the funds would be used for your designated purpose.

GIFTS THAT PAY YOU BACK

With a Charitable Gift Annuity (CGA), you provide the foundation with a tax-deductible gift of cash, appreciated securities, or other acceptable assets. In return, you receive a fixed income for the remainder of your life. When annuity payments end, the remaining principal of your gift becomes available to the foundation for your designated purpose, whether it's leadership programming, academic scholarships, museum and historical initiatives or operations.

SPECIAL RECOGNITION

The Sigma Chi Foundation recognizes those who create planned gifts with membership in the James Parks Caldwell Society. Caldwell Society members are recognized within the Sigma Chi foundation's Annual Report, receives a distinctive lapel pin and Sigma Chi foundation publications.

For more information about an insurance estate plan or any of our Planned Giving options, please contact Senior Director of Planned Giving Frank Raymond, **PENN STATE 1971**, at (847) 420-3731 or at frank.raymond@sigmachicago.org.

Note: This information is not intended to serve as legal or tax advice. Please consult a professional advisor.

SUPPORT EVERY PRIORITY

Annual Fund pushing Sigma Chi forward

Whether it's world-class leadership programming, a groundbreaking new Sigma Chi U online platform, the many scholarships, or operational funding, gifts to the Sigma Chi Foundation's Annual Fund are invested into each aspect of our mission.

On average, the Sigma Chi Foundation generates more revenue, provides more program support and directs more of it to leadership and scholarships than any other Greek fraternity or sorority

Foundation, but there is much more to be done.

Increases in funding along with the addition of Sigma Chi's more recent leadership training modules such as the eight-week Preparation for Brotherhood online pledge education program through Sigma Chi U, the anti-hazing Jordan Initiative, the Sexual Misconduct Prevention Retreat and the Sigma Chi Lifeline online resource have served as evidence of the work sponsored

through annual fund donations.

These funds support our general academic scholarships annually, increased chapter developmental efforts, as well as the opportunity for every Sigma Chi chapter to request one of the many workshops concerning everything from drug and alcohol abuse to recruitment.

Your unrestricted donation to the Annual Fund also allows us to better communicate with alumni and operate

headquarters and historical facilities, including the new, state-of-the-art Chuck and Kim Watson Museum of Sigma Chi, renovation of the Sigma Chi Founding Site in Oxford, Ohio and archival preservation efforts.

For more information about the White Cross Trust level of giving or Annual Fund donations, contact Foundation Director of Development for Annual Programs Barbara Barabas at Barbara.Barabas@sigmachicago.org.



Photo contributed

Significant and Order of Constantine Sig Ed Blessing, SAN DIEGO STATE 1960 (right) was among the distinguished visitors to attend Huntsman Horizons Leadership Summit in Utah.

2017 DISTINGUISHED VISITORS

HUNTSMAN HORIZONS LEADERSHIP SUMMIT

Don Schefmeyer, **SYRACUSE 1969**

— Career Real Estate and Mortgage Professional, Former Board Member for Mortgage Bankers Association of America, Current Advisor to various equity funds

Ken Mallin, **WASHINGTON (ST. LOUIS) 1982***

— Partner, Bryan Cave

Steve Schmidt, **PURDUE 1976*^**

— Retired President, Office Depot International

Tim Powers, **CALIFORNIA-LOS ANGELES 1977***

— Managing Partner, Haynes and Boone, LLP

Ed Blessing, **SAN DIEGO STATE 1960*#^**

— Managing Director, Blessing Petroleum Group, LLC

PJ Stephens, **WASHINGTON (ST. LOUIS) 1971#**

— CEO, Arkadia International

Pete Bassi, **RHODE ISLAND 1970***

— Former Chairman of Yum! Restaurants International

Dudley Slater, **CALIFORNIA-LOS ANGELES 1979**

— Former CEO/Co-Founder of Integra Telecom; Industry Advisor, EQT Partners

Randy Coppersmith, **SOUTH FLORIDA 1979**

— Chairman, The Hollymar Group, LLC

Thomas Cook, **INDIANA STATE 1986**

— President & CEO, Thomas Cook & Associates

BALFOUR LEADERSHIP TRAINING WORKSHOP

J. Roger Glunt, **PITTSBURGH 1960*#**

— President, Glunt Development Co.

Scott Altman, **ILLINOIS 1981***

— Senior VP for Civil Programs, ARSC Federal; Former NASA Astronaut

Brantley Haigh, **CALIFORNIA-LOS ANGELES 1979**

— Principal, Ventana Capital

Col. R. Bruce Roehm, **CENTRE 1987**

— Director, Air Force Medical Service Analytics, USAF

Scott Williams, **KANSAS 1985**

— President, Cabela's

Bob Loftin, **ALABAMA 1979**

— Founder, Elyton Partners

Jack Sammons, **ALABAMA 1977***

— Chief Administrative Officer, City of Memphis

* - Significant Sig # - Order of Constantine Sig ^ - Foundation Board

Distinguished Guests

The Sigma Chi Foundation's Distinguished Visitors program has provided alumni with an opportunity to reconnect with their Sigma Chi roots and impact undergraduate brothers since its inception in the 1980s.

Over the summer months, 17 brothers, including eight Significant Sigs and three Order of Constantine honorees participated with visits to Huntsman Horizons Leadership Summit in Snowbird, Utah or Balfour Leadership Training Workshop in Bowling Green, Ohio.

These men, who are among Sigma Chi's most accomplished brothers, collectively represented 13 different chapters and have attained top tier success within various fields of business including finance, retail, medicine and major chain restaurants.

Brothers are encouraged to share their wisdom and perspective on leadership, character and values within undergraduate brothers during their visits to the respective

programs. Those who participate in the DV program leave with a renewed passion for Sigma Chi, and a better appreciation for its programs.

A limited number of DVs are selected each year and attend their chosen program for 2-3 days.

Among the participants at Horizons was Significant and Order of Constantine Sig Ed Blessing, **SAN DIEGO STATE 1960**. A past Vice Chairman of the Sigma Chi Foundation's Board of Governors, Blessing appreciated the opportunity to mentor young men from across the United States and Canada.

"I was honored to be invited and to be given the opportunity to share my thoughts," Blessing said. "It was humbling to be associated with these young men who will endeavor to make our world a better place."

For more information on the Distinguished Visitors program, contact Dakota Chavez at dakota.chavez@sigmachi.org.

the social feed

like us on Facebook: [facebook.com/sigmachifoundation](https://www.facebook.com/sigmachifoundation)

follow us on Twitter: [@sigmachifdn](https://twitter.com/sigmachifdn)

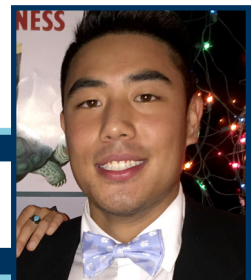
contact us

e-mail: foundation@sigmachi.org

mail: 1714 Hinman Avenue, Evanston, IL 60201

"The Sigma Chi Foundation scholarship I received allowed me to pursue my passions in and out of the Fraternity with less restraint. I was able to maximize my efforts continuing to be involved in activities within my chapter, and maintain higher grades with less worry of my financials."

ERIC TAI, UNIVERSITY OF NORTH CAROLINA
GENERAL ACADEMIC SCHOLARSHIP



LEAD BY EXAMPLE.

Supportive alumni across the United States are helping young brothers leave their own legacy at their home chapter through values-based leadership and academic scholarship benefits provided by the Sigma Chi Foundation's **Thomas Cowan Bell Chapter Challenge**. When compared to non-Bell undergraduate chapters*, Bell recipients *averaged* a higher overall cumulative GPA, as well as...

58%

MORE BROTHERS
ON DEAN'S LIST

63%

MORE BROTHERS
ACTIVE IN CAMPUS
ORGANIZATIONS

84%

MORE BROTHERS
WITHIN ACADEMIC
HONOR SOCIETIES

400

MORE HOURS OF
COMMUNITY
SERVICE PER YEAR

\$7,400

MORE RAISED PER
CHAPTER FOR
PHILANTHROPY

“May we so live that it may be said of each of us, as we join those that have gone before us to the pale realm of shade: ‘The world is better of his having lived.’”

Founder Thomas Cowan Bell, MIAMI (OHIO) 1857, 1905 Semi-Centennial celebration



THOMAS COWAN BELL CHAPTER CHALLENGE

* — All data based on the 2016 Sigma Chi International Fraternity Annual Report (Peterson accreditation data) filed by undergraduate chapters