

Sigma Chi

FOUNDATION



ENGAGE. LEAD. IMPACT.

LEADERSHIP PROFILE: PRESIDENT

OVERVIEW

Since 1855, **Sigma Chi International Fraternity** has become the preeminent Greek-letter collegiate organization. Its principles and values are timeless. Its members, sharing a common bond of brotherhood and vision to leave a lasting positive impact on the world, have transformed and inspired every major global industry.

Over the last 25 years, a key to the Fraternity's overall success has been the ability of the **Sigma Chi Foundation** to fund the programming and academic needs of our members. The Sigma Chi Foundation is the largest and most active foundation in the collegiate Greek system. Founded in 1939, it is a charitable and educational tax-exempt organization, separate and independent from the International Fraternity. Its mission is to provide grant support for the Fraternity's transformational leadership programs and academic scholarships for its members.

Successfully performing that mission, the Foundation has provided more than \$15 million to directly support the creation and launch of the **Sigma Chi Leadership Institute**, the first fully accredited learning service provider in Greek-letter history, which in turn has created the **Transformational Leader**, the industry's first comprehensive leadership and life skills development program. And in the current fiscal year, the Foundation has provided \$612,000 to our robust **academic scholarships** program.

"The generous alumni who made my scholarship possible have certainly inspired me to put forth the same level of support to the fraternity and its members in my future."

Carson Billingsley
INDIANA 2023



The Sigma Chi Foundation awarded \$612,000 in academic scholarships to more than 380 individuals, including the three brothers pictured above, for the present 2022 to 2023 academic year.

OVERVIEW

The next **President of the Sigma Chi Foundation** will build on the Foundation’s strong track record and resources, leveraging our full range of assets—human, reputational and financial—in pursuit of **four strategic objectives**:

- To significantly increase the dollar value of funds available to support the Foundation’s mission through enhanced donor and prospective donor engagement;
- To materially expand the availability of unrestricted funds through the growth of the Annual Fund;
- To drive the long-term growth of the Foundation’s endowment through the expansion of Planned Giving;
- To further develop and deploy the organization and its functional capabilities in support of these objectives.

Working collaboratively across the entire Sigma Chi enterprise, the Foundation President will inherit an experienced, dedicated staff and Board of Governors committed to building the transformational leaders for generations to come.



Legacy leadership programs include the **Horizons Huntsman Leadership Summit** (top left) and the **Krach Transformational Leaders Workshop** (top right)



According to Pennington and Company, the Sigma Chi Foundation, on average (over the past decade), has provided more total annual support, program services and grants and raised more revenue than any other Greek-letter Fraternity or Sorority Foundation.



"If you're blessed with more financial resources than you need to live on, then I think it's your obligation to give back. And where do we want to give back? We want to give back to the organization that helped us grow. There's no organization that helped me grow more than Sigma Chi."

*Order of Constantine and Significant Sig Bill George
GEORGIA TECH 1964 (Author of "True North")*

The leader selected as President:

- Will be connected to many successful and high-level community and business leaders and philanthropists throughout the United States.
- Will be a visible leader amongst national interfraternal leaders and philanthropic organizations due to the size and reputation of Sigma Chi.
- Will have an opportunity to make a significant impact on the Sigma Chi members of tomorrow by working to fund programs that develop essential leadership and personal skills.
- Will work with a highly motivated and accomplished Board of Governors, staff, and donor base.

HISTORICALLY SUPPORTED BY INTERNATIONALLY-RENOWNED LEADERS

including **Keith Krach** (Former Chairman & CEO, Docusign), **Bill Marriott** (Former Chairman, Marriott International), **Philip Anschutz** (Co-Founder, Major League Soccer), **Dave Dillon** (Former CEO, Kroger), **Robert Johnson** (Chairman, Spirit Aerosystems), **Robert Basham** (Co-Founder, Outback Steakhouse), **Jim Haslam Sr.** (Founder, Pilot Flying J), **Rick Smith** (Founder & CEO, Axon), **Hon. John Koskinen** (Former Chairman & CEO, Palmieri Company)



Keith Krach



Bill Marriott

THE POSITION AND CANDIDATE

The next President will be a Sigma Chi who is a proven executive of an enterprise with demonstrated experience in philanthropy, financial acumen and the ability to develop, lead and inspire a high-performance team. He will possess the ability to excite and inspire the participation and donations of new categories of alumni who have not yet been involved in Fraternity and Foundation initiatives.

WORK EXPERIENCE AND COMPETENCIES

- A tested executive, fully comfortable interacting with a large, engaged Board of Directors and able to lead an organization that depends on effective, positive collaboration with a variety of constituencies, including alumni, the Fraternity and its various organizations.
- Financially savvy with prior P&L responsibility and knowledge of budgeting, financial statements, cash flow management, fund accounting and internal controls; experience with commercial banking and investment management organizations.
- Proven experience in strategic and long-range planning.
- Experienced spokesperson, joyful storyteller, intentional relationship-builder and exceptional fundraiser with a clear, compelling vision.
- Demonstrated knowledge of the laws, regulations and compliance requirements surrounding charitable giving and fraternities; knowledgeable of various giving vehicles and tax strategies.
- Working knowledge of Salesforce; proficiency with Microsoft Office, Zoom and Teams technology
- Experience with managing sales, marketing and public relations.

PERSONAL QUALITIES

- An enthusiastic values-driven leader who exemplifies the ideals of Sigma Chi.
- Strong work ethic and willingness to travel throughout the U.S. and work evenings and weekends, as necessary, to attend events, programs and cultivation efforts.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be an exhaustive list of all duties, responsibilities, and skills.

THE POSITION AND CANDIDATE

PERSONAL QUALITIES

- Exceptional written and verbal communication skills.
- Proven managerial skills, including the ability to prioritize numerous projects, delegate effectively, set high performance expectations, follow-up consistently and drive organizational goals and deadlines.
- An innovative thinker, team player and bridge-builder who can energize support for shared goals among multiple constituencies with varying priorities.

COMPENSATION

The Foundation provides a base salary competitive with similar-sized university and non-profit organizations, an annual incentive compensation plan that rewards outstanding performance, and a comprehensive benefits package, including professional development training and ongoing education.

LOCATION

It is preferred that the next President will reside within the Chicagoland area near Sigma Chi's J. Dwight Peterson International Fraternity Headquarters (*below*) in Evanston, Illinois. However, due to the significant travel requirements of this position, consideration will be given to someone who resides in a city that would provide efficient travel to Chicago and commits to spend meaningful time in Evanston on a regular basis to interact with and oversee staff, and to coordinate with Fraternity leadership.

Evanston is 12 miles north of downtown Chicago and is also home to Northwestern University and the headquarters of Rotary International, Alpha Phi and Sigma Alpha Epsilon.



The above statements are intended to describe the general nature and level of work being performed. They are not intended to be an exhaustive list of all duties, responsibilities, and skills.

THE CURRENT FOUNDATION ORGANIZATION



Jeff Gill

The Sigma Chi Foundation is currently led by Chairman and Significant Sig Jeff Gill, **SOUTHERN CALIFORNIA 1978**, and a 20-member Board of Governors (FBOG) comprised of successful alumni executives, past Fraternity leaders and longtime organizational volunteers.

The President reports to the Board Chairman and leads the Foundation's staff and support team organization totaling 21 individuals overall.



John Price

Currently, the Foundation team is being led by our most senior officer, Vice President of Operations and General Counsel, John Price, **OKLAHOMA STATE 1991**.

Senior Director of Principal Giving, Greg Morgan, **SOUTH FLORIDA 2009**, leads the 11-member development and fundraising team serving in locations throughout the U.S.



Greg Morgan

The President will also work closely with Mike Church, **ILLINOIS 2005**, executive director of Sigma Chi's headquarters staff and operations. He will also have frequent interactions with the leadership of Sigma Chi Leadership Institute, particularly its Board Chairman, 68th Grand Consul and FBOG member Mike Greenberg, **ILLINOIS WESLEYAN 1982**, and Jim Cogdal, **BRADLEY 2003**, executive director of SCLI's staff and operations.

For more information on the Foundation, including bios of the Board of Governors and staff, the most recent annual report and ongoing initiatives visit the Foundation's website at <https://sigmachi.org/foundation>.

THE OPPORTUNITY

Sigma Chi has more than 250,000 living alumni. By way of illustration, this figure exceeds the total number of living alumni for Dartmouth College and Duke University combined. Yet the Foundation had but 4,400 individual donors last fiscal year, representing less than 2.0% of the alumni base. By comparison, 44.0% of Dartmouth alumni and 35% of Duke alumni contributed to their alma maters last year. If the Foundation could improve its yield to 5.0%, it would add at least 8,250 new donors.



While the potential is significant, achieving success will require dedicated work and thoughtful changes to our strategy and operations. To support this initiative in Spring of 2021, the Foundation developed and adopted a comprehensive, detailed Five-Year Plan to:

1. More than double annual GAAP revenue to \$14.5 million;
2. Secure an aggregate of \$20.0 million in new non-GAAP planned gifts during the five-year period, with annual planned giving commitments reaching at least \$5 million in 2025-26;
3. More than double funds available for mission support to \$9.6 million in 2025-26; and
4. Increase annual scholarships to exceed \$1 million per year.

For the fiscal year ending June 30, 2022, the first year of the Five-Year Plan, the Foundation reported a solid start by raising \$8.6 million in GAAP revenue and a record \$4.11 million in planned gifts. The Foundation also provided \$612,000 in scholarships to undergraduate and graduate students during the period. All figures exceeded those contained in the Five-Year Plan.

Looking forward, the current fiscal year is expected to be more challenging as the economy cycles and the financial markets face increased uncertainty. The new President will be charged to lead the Sigma Chi Foundation forward in this environment, to oversee the achievement of the Five-Year Plan and ensure the Foundation continues to provide important support for the Fraternity and its leadership development programs.

THE SIGMA CHI ENTERPRISE

Did you know? Sigma Chi consists of five separate legal entities: Sigma Chi International Fraternity, Sigma Chi Foundation, Sigma Chi Leadership Institute (SCLI), Risk Management Foundation (RMF) and the Constantine Housing Initiative (CHI).



231

Active Chapters

15,245

Undergraduate
Members

4,000+

Graduates Per
Year

124

Alumni Chapters

250,000+

Living Alumni
Members

Sigma Chi is one of the largest college fraternities with undergraduate chapters at 231 universities and colleges and more than 364,000 all-time members. Sigma Chi provides a welcoming environment for young men of different temperaments, talents and convictions to enjoy a unique lifelong bond that extends far beyond college. Through world-class leadership training, extensive mentoring programs and a strong focus on academic achievement, Sigma Chi sets itself apart as the preeminent collegiate leadership development organization, challenging its members to live by its core values and exemplify Character-in-Action™ in every aspect of their lives. For more information visit www.sigmachi.org.

Vision: To positively impact the world by inspiring and empowering our members to be transformational leaders

Mission: To foster a brotherhood of transformational leaders who are committed to friendship, justice and learning



KEY UNDERGRADUATE ACCOMPLISHMENTS:

- **150+ chapters** recognized for excellence
- **62.6% chapters** at or above all-men's GPA avg.
- **12 chapters** with student body presidents
- **200+ chapters** with IFC/student body officers
- **85% members** involved in other campus orgs.
- **\$4.4 million** raised by chapters for charities
- **9.5 community service hours** per active member

** Overall metrics as of January 15, 2023; Undergraduate accomplishments reflect 2021 to 2022 fiscal year

SIGMA CHI ENTERPRISE



The leadership development arm of the Fraternity, the **Sigma Chi Leadership Institute (SCLI)** was formally unveiled in 2019 following more than two decades of work producing groundbreaking educational programming for members. In July 2022, the Sigma Chi Leadership Institute (SCLI) achieved accreditation by the Middle States Association Commission on Elementary and Secondary Schools (MSA-CES), which is recognized by the U.S. Department of Education. **Sigma Chi, in partnership with SCLI, is the first and only fraternal organization to offer an accredited leadership experience through its revolutionary Transformational Leader offering.** Largely funded by the Sigma Chi Foundation – over \$15 million to directly support SCLI and leadership programs since 2014 – the Transformational Leader program incorporates online and in-person learning, including the Fraternity’s premier leadership vehicles, the *Krach Transformational Leaders Workshop (Krach TLW)* and *Horizons Huntsman Leadership Summit (Horizons)*. For more information visit: <https://scli.org>



The Sigma Chi **Risk Management Foundation (RMF)** was founded in 1988. Its mission is to educate members on risk management, foster a fraternal culture of safety and responsibility, and provide chapters with access to affordable, comprehensive insurance coverage. It covers more than 15,000 brothers and \$250 million in Sigma Chi property and is the only program of its kind in the Greek-letter world. For more information visit: <https://sigmachi.org/rmf/home>



The Sigma Chi Risk Management Foundation created the **Constantine Housing Initiative (CHI)** to work as a consultative partner with local Sigma Chi house corporations to provide real estate and asset management resources for loan financing, property management and project management. CHI also has the ability to preserve and take possession of title on a chapter house when necessary and appropriate. For more information visit: <https://sigmachi.org/chi/home>

LEARN MORE OR APPLY TODAY

To learn more or apply for this position,
please visit sigmachi.org/jobs

Please direct any questions to Sigma Chi Senior
Director of Operations and Human Resources
Dakota Neff at dakota.neff@sigmachi.org

A person is seen from behind, wearing a yellow t-shirt. The t-shirt features the 'Sigma Chi' logo in a stylized script font at the top. Below the logo is a graphic of two riders on horseback, likely representing a rodeo or derby event. Underneath the graphic, the text 'DERBY DAYS 2018' is printed in a bold, sans-serif font. At the bottom of the t-shirt, the text 'PHI OMICRON PI • ALPHA SIGMA TAU' is visible. The background is a blurred indoor setting with other people, suggesting a social gathering or event.

Sigma Chi
DERBY DAYS 2018
PHI OMICRON PI • ALPHA SIGMA TAU