

Educational Foundation Annual Report 2007-2008

VISION STATEMENT

Supporting the development of ethical leaders and cultivating a lifelong commitment to the educational and charitable missions of Sigma Nu.



MISSION STATEMENT

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

We will:

- Support educational and leadership programming initiatives.
- Provide scholarships to support academic achievement.
- Enable members and friends to support these programs through tax-deductible contributions.
- And, cultivate a lifelong commitment to the educational and charitable missions of Sigma Nu.

Craig Haesemeyer (Iowa)

Chairman, Sigma Nu Educational Foundation



Dear Brothers, Supporters and Friends:

This past year was truly remarkable for our great Fraternity, and I am pleased to share with you the 2007-2008 Annual Report of the Sigma Nu Educational Foundation.

The job of the Educational Foundation is to provide financial support for the exceptional, educational programs of the General Fraternity, which serve to benefit every undergraduate member of our 184 chapters and colonies across the United States and Canada. I trust you will be encouraged by our progress and excited about the Foundation's direction for the future.

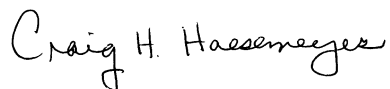
Last year, a group of Foundation Board members, donors and staff gathered to conduct a strategic planning session. The results of this session are already shaping the future of our Foundation and will continue to do so for years to come. Please

allow me share with you some of the plans we are already pursuing and those that are on the horizon:

- We are engaged in a capital campaign that will help us secure the necessary funding to support and expand the Fraternity's educational programs.
- We have expanded our core of volunteers to support our campaign efforts.
- We continue to recruit, train, and maintain a professional staff to carry out the vision of the organization.
- We will expand our communication efforts in order to help alumni stay informed of the Foundation's mission.
- We will partner with the General Fraternity to develop an appropriate alumni relations program which supports the mission of both the Fraternity and Foundation.

As you can see, there is much work to be done to preserve and enhance the future of our great Fraternity. I want to thank the loyal supporters of the Educational Foundation. Your continued leadership will allow us to sustain and increase our support of the educational initiatives of the Fraternity. If you have not been an active supporter, I encourage you to join our ranks today. Help us to deliver the Sigma Nu experience to the deserving young leaders of tomorrow.

Yours in brotherhood,



Craig H. Haesemeyer (Iowa)
Chairman, Sigma Nu Educational Foundation

2007-2008 YEAR IN REVIEW

2007-2008 Returns a Record Number of New Donors & Inspirational Growth in Revenue

With broad-based alumni response to our capital campaign, *Building Upon the Rock...Preserving Our Future*, Sigma Nu is proud to announce a record number of first-time Foundation contributors during 2007-08. More than **650** alumni made their inaugural gift last year.

\$8.4 million has already been raised toward the \$14 million campaign goal.

The total number of donors last year rose by just over **50%** to **3,299**.

Overall, contributions to the Foundation increased from \$1.67 million in 2006-2007 to **\$5.4 million** last year.

Parents of Sigma Nu collegians invested **\$30,000** in the Foundation through gifts and pledges.

Undergraduate giving at Grand Chapter more than doubled, yielding **113** gifts from collegiate members in attendance.

The Founder's Club honors generous donors who commit \$1,000 each fiscal year to support the educational and leadership-building mission of Sigma Nu. During 2007-2008, membership in the Founder's Club increased by **12%**.

Add outstanding alumni and collegiate participation at the 63rd Grand Chapter and the Foundation was able to double its grants for housing, scholarships, and Fraternity educational programs. Our goal in the coming months is to increase the momentum, capitalize on these successes and engender the support of all alumni in this groundbreaking initiative.

Capital Campaign Goal Increased Due to Overwhelming Alumni Support

Extraordinary alumni response to Sigma Nu's *Building Upon the Rock...Preserving Our Future* capital campaign has put the Fraternity's future on firm footing.

Members' generosity has prompted Foundation directors to announce a

\$4 million increase in the original **\$10 million** goal. The Sigma Nu

Educational Foundation expects to reach its new **\$14 million** objective by June 30, 2010. This funding will secure a long-term endowment of the Foundation's top educational and leadership objectives, including:

\$6 million for chapter housing and scholarship grants, loans and endowment

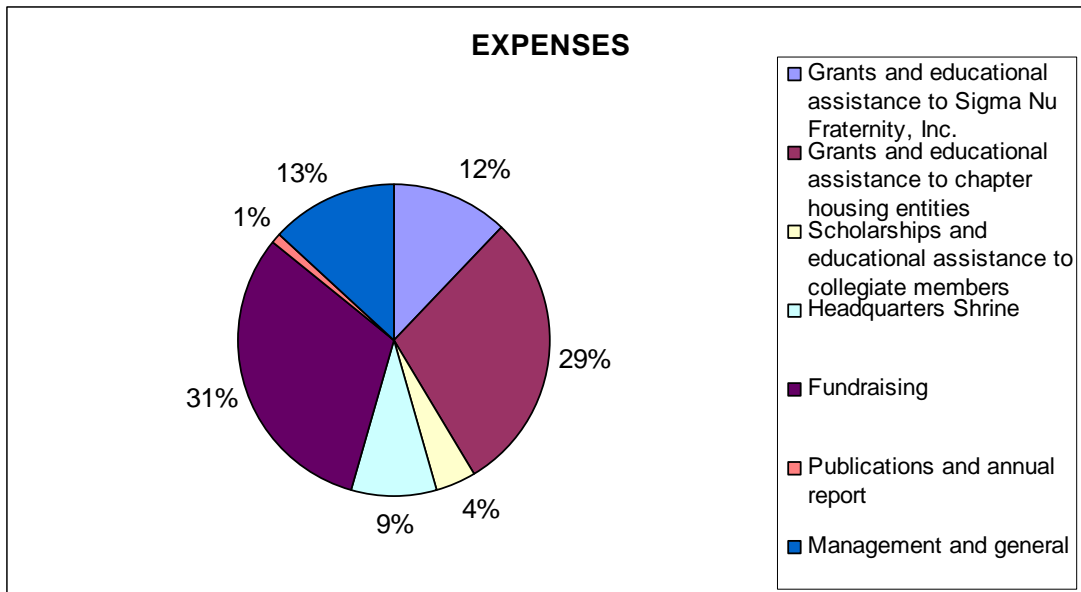
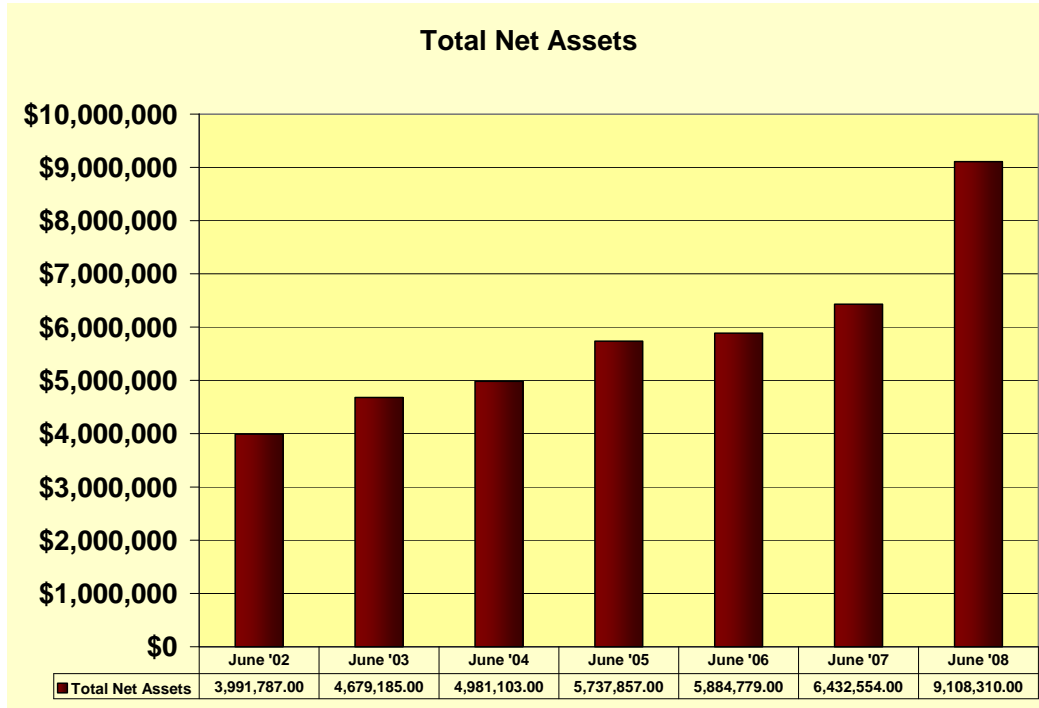
\$5 million for funding of the LEAD Program and endowment

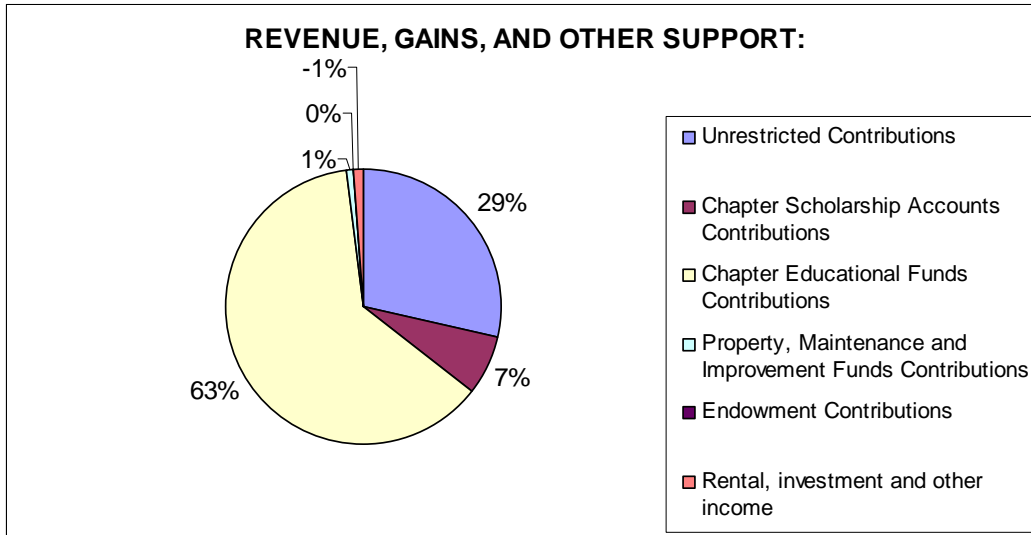
\$2 million for ongoing programming

\$1 million for historic preservation of the Headquarters Shrine

FINANCIALS

The assets of the Foundation have increased by more than \$2 million in the last year.





***Charts are based upon unaudited financial statements**

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. He has a Bachelor's degree in Human and Organizational Development from Vanderbilt University. In his spare time, he enjoys movies, sports and history.

Kevin G. Coxwell (Georgia State)



Kevin Coxwell joined the Sigma Nu Educational Foundation staff as a Director of Development last year. Previously, he served the General Fraternity as Interim-Director of Recruitment. Kevin initially joined the staff in June 2005 as an Educational Leadership Consultant working with chapters throughout the Southeast Region.

Originally from Atlanta, Georgia, Kevin is an initiate of the Eta Gamma Chapter at Georgia State University. It was there that he received his Bachelor of Arts degree with a major in Economics and a minor in Speech.

During his time at Georgia State he served his chapter as Commander, Lieutenant Commander, Chaplain and Alumni Relations Chairman. In his free time Kevin enjoys traveling and playing golf.

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. In his free time he does improv comedy and is training to become a white water rafting river guide.

Michael Mills (College of Charleston)



Michael joined the staff of the Sigma Nu Educational Foundation as a Director of Development in February 2007. He worked for the Fraternity in 2004-2005 as a Leadership Consultant in the Southeast Region. Michael then returned to Charleston, South Carolina—home of his alma mater—where he worked as a financial advisor until accepting the position with the Foundation.

As a freshman at the College of Charleston, Michael was involved in the re-chartering of the Iota Rho Chapter in

1999. He held the offices of Recorder, Treasurer, Lieutenant Commander and Commander of his chapter. When he returned to Charleston after working for the Fraternity, he served as Chapter Advisor to the Iota Rho Chapter and Division Commander for the Carolinas Epsilon Division.

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 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.

2007-2008 FOUNDATION OFFICERS AND VOTING DIRECTORS

EXECUTIVE COMMITTEE

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) and, currently, as Chairman (2007-2009).

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, Calif. 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, Calif., with their son, Christian.

William K. (Bill) Stoffer (Albion)



Bill Stoffer joined the Board of the Sigma Nu Educational Foundation in May 2002 and is currently serving as President. He is Vice Chairman of the Board of Trustees of Albion College, where he has served for 25 years. Bill 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 is President-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 six 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 recent involvement as a Boy Scout Troop Committee Chairman for 5 years, on his homeowner's association board for 6 years, 22 seasons as a youth soccer coach and the past 13 years in Indian Guides. Bob and his wife, Terry, have two sons, Trevor (19) and Hunter (12).

David C. (Dave) 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, Ariz. 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.

Donald K. (Don) 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, Ind. 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).

Albert W. (Al) Wurster (Purdue)



Al Wurster was recently elected to serve as an At-Large Member of the Board of Directors for the Sigma Nu Educational Foundation. Al is President of Wurster Construction Company based in Indianapolis, Ind. 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 the Foundation's 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 10 to 17 years old.

VOTING DIRECTORS

James L. (Jim) 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, Conn.

James C. (Jim) 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.

Charles R. (Charlie) Eitel (Oklahoma State)



Charlie Eitel joined the Board of Directors following Grand Chapter 2008, at which he gave the Maddox Honor Lecture on the topic of “Leadership in the 21st Century” and was honored as the 45th Inductee into the Sigma Nu Hall of Fame. He has remained involved with Sigma Nu since his graduation and is a consistent donor to Epsilon Epsilon, having established a \$25,000 academic scholarship for eligible chapter members and helped fund two renovations at the Sigma Nu house, providing carpet, furniture and bedding.

Author, speaker and Ernst & Young’s 2008 Entrepreneur of the Year for the southeast, Eitel is the current Chairman and CEO of the Simmons Bedding Company, one of the largest branded bedding companies in the world. His successful business career includes recognition for his leadership skills and business acumen, which helped turn around five different companies, four of which were in the carpet industry. He is active in many civic and professional organizations, including World Presidents Organization, International Business Fellows, Oklahoma State University Foundation Board of Governors and Who’s Who in American Business. Married to Cindy, his college sweetheart and wife of 37 years, they reside in Atlanta, Ga., and have three grown children.

Michael D. (Mike) 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 Marshal, 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.

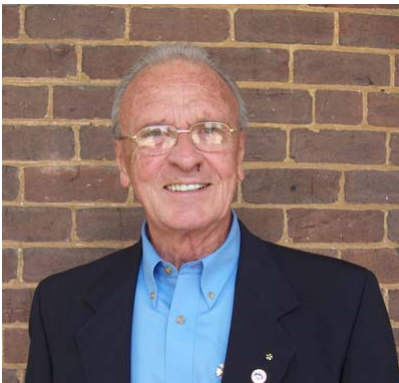
Robert L. (Bob) Marchman, III (Emory)



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, Ga., enjoying farming and bird hunting.

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.

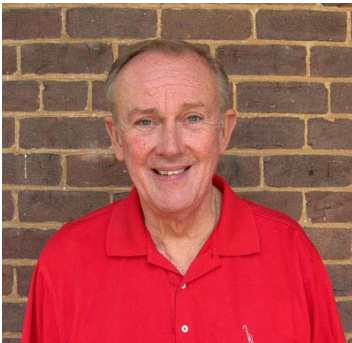
Daniel (Dan) Rodriguez (Arizona State)



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, Ore.

Joseph F. (Joe) Wood (Oregon State)



Joe 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.

Joe is 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, Ore.

Chapter Educational Funds and Chapter Scholarship Accounts

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

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 web site.

[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 Hastings](#) 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 to 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.

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 (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
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)
 * 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. 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 Ben Chitty, Jr. (Sewanee)
 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 Donors for 2007-2008, please visit the [Sigma Nu web site](#).

For a complete list of Matching Gifts for 2007-2008, please visit the [Sigma Nu web site](#).

EDUCATIONAL PROGRAMS

Excellence Through Education is the Fraternity's second-highest priority as determined by its Board of Directors. It is within the educational programs and services that much of the Fraternity's 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.

In our own way, 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, brothers learn about themselves as leaders, connect with brothers from chapters and colonies across the country and find

solutions to challenges faced in their chapters and in their lives. College of Chapters is based on the Phase II curriculum of the LEAD Program. Two (2) representatives from each chapter and four (4) from each colony are required to attend. Chapters may send more delegates if they choose. Typically between 350 to 400 brothers attend each year.

LEAD Program

PHASE I – CANDIDATES:



Phase I is designed to give our Candidate members the knowledge and skills they will need to become good active brothers in the chapter. Phase I consists of 10 sessions—and 2 optional sessions (Community Service and Time Management)—that should 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.

PHASE II – 2nd YEAR MEMBERS (SOPHOMORES):

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 III – 3rd YEAR MEMBERS (JUNIORS):

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-paced program and takes 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 IV – GRADUATING SENIORS:

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.

ALLCHAPTER:

All Chapter LEAD Programming is designed for participation of the entire chapter. All Chapter LEAD Programming is organized into three modules.

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](#)



AlcoholEdu was the nation's first online alcohol misuse and abuse prevention program, and today it is used on more than 450 college and university campuses

nationwide. The program creates a learning experience for a population of 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

Sigma Nu began making AlcoholEdu available online, free of charge, to all undergraduate members in 2004. Approximately 1,400 Sigma Nu members, primarily Candidates taking the course as part of their Phase I curriculum, participated in the program last year. Beginning in the 2008-2009 academic year, Sigma Nu is transitioning from the AlcoholEdu program to a program designed specifically for Greek students called GreekLifeEdu, which focuses on the prevention of alcohol abuse, hazing and sexual assault. More information about the new program is available on the Sigma Nu web site.

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 increased from 25 to 37 chapters in the first two years of the program. Since the program began four years ago, more than \$574,000 has been raised for charitable organizations and participating collegiate chapter members gave more than 3,700 volunteer hours.

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, Va.

The pilot program was so successful that it was implemented regionally this past year. Six 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 and Recruitment Chairmen. More than 240 students from 65 collegiate chapters were in attendance.

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.