



ENVISIONED FUTURE

SIGMA NU EDUCATIONAL FOUNDATION | ANNUAL REPORT 2015



To develop ethical leaders inspired by the
principles of Love, Honor and Truth.

To foster the personal growth of each man's
mind, heart and character.

To perpetuate lifelong friendships and
commitment to the Fraternity.

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Foundation**

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How Your Giving Impacts Our Fraternity

Your support for the Sigma Nu Educational Foundation influences several key educational initiatives of our Fraternity.

The Fraternity's Strategic Plan prioritizes an "Envisioned Future" for leadership in action, excellence, growth, and membership value, each with specific goals tied to their realization.

Every year, the Fraternity issues a Milestones and Exceptions Report assessing our progress toward this Envisioned Future.

The following significant accomplishments from 2014-2015 illustrate the influence your support has on Sigma Nu's present reality and anticipated future success.

CHAPTER STRENGTH IMPERATIVE

Foundation dollars support a portion of chapter consultation visits, Sigma Nu Institutes, and College of Chapters—each is designed to invest in the leadership abilities of our collegians and elevate chapter strength. In the last year:

- 100% of chapters received two consultation visits with an overall effectiveness rating of 3.75 out of 4.0 scale on post-consultation surveys (90% responded)
- 3,426 chapter officer consultations were conducted; 475 (443 last year) group workshops conducted for chapters.
- 63% of chapters have active, engaged Alumni Advisory Boards; 16% are actively recruiting advisors
- 71 chapters increased total chapter manpower by 10% or more
- Sigma Nu Institutes were held in 10 locations with 485 participants from 90 chapters
- Institute participants reported significant improvement in knowledge and skill in nearly every curriculum/competency area compared to pre-program levels
- Participants rated the Institutes 3.58 on a 4.0 scale, overall
- 94% of chapters attended College of Chapters; intended outcomes rated 4.73 on 5.0 scale; Commanders rated overall experience 4.64 on 5.0 scale



Above: Anish Sharma (Mississippi), 2015 NIC Undergraduate Award of Distinction recipient.

100%

Percentage of chapters that received two consultation visits

3.75

Overall effectiveness of consultation visits on a 4.0 scale

63%

Percentage of chapters that have active and engaged Alumni Advisory Boards



EXCELLENCE THROUGH EDUCATION IMPERATIVE

Your support enhances educational programming designed to assist our members in ethical leadership development and personal growth. Historic preservation of the Headquarters Shrine and our archives also enriches and strengthens our brotherhood. Your support makes these achievements possible:

- **LEAD Program is available online, interactive, and on-demand; first in the Greek world**
- **Biennial independent evaluation of LEAD Program, conducted by George Mason University, completed summer 2014; 99% of chapters participated**
- **71% of chapters reported using LEAD Phase III—the curriculum that shows members how to put leadership skills into practice—up from 65% last year**
- **Sponsored 5th annual “40 Answers in 40 Days” anti-hazing social media campaign**
- **Sigma Nu is a founding member of EverFi (previously known as the Alcohol**

Prevention Coalition), a consortium of eight Greek organizations working with leading colleges and universities across the nation to prevent alcohol misuse

- **90% of collegiate members have completed the educational portion of GreekLifeEdu, a program that educates college students about alcohol misuse, hazing, and sexual assault**
- **Improvements completed to most public areas of Headquarters Shrine**
- **Continued work to cull, classify, and protect important historical items**
- **Developed plan for new memorial marker for Greenfield Quarles gravesite**

Thank you for playing a key role in strengthening our educational programming and thus our collegiate members and their chapters.

Michael Profenno (Southern Maine)

“I think of fraternity when I think of philanthropy.”

My Chapter Brothers are truly my family for life — an extension of my immediate family. The relationships, the bonds, the family has extended into my adult life as an alumnus. My fraternal experience is still unfolding.

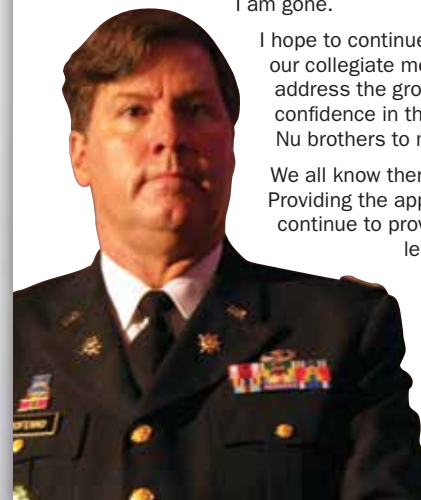
I think of fraternity when I think of philanthropy. I like to think that my philanthropic gifts of time and treasure are strengthening the Fraternity for the leaders we want to produce in the future.

There is such a great need for ethical leaders among the younger generations. I see that they want to become great leaders, they want to do good in the community, and they want to give back — they just need to know how.

I have great confidence in the ability of Sigma Nu to deliver on their fraternal mission and I feel a great sense of gratitude for the ability to support this endeavor.

I was in the process of updating my will already when I saw a few articles in *The Delta* about others who have given in a similar way. Through research of the organization and other conversations with Foundation staff, I learned more about the importance of supporting leadership development through the national fraternity. I was impressed with the Fraternity's leadership and their ability to meet their strategic goals. It was ultimately this confidence in the leadership of the national fraternity and Foundation that motivated me to finalize the bequest. I hope others will recognize our Fraternity's strong leadership and choose to support Sigma Nu with both time and treasure.

My annual gifts are important to the daily operations, but the lasting legacy I'm able to create by contributing through my will is much more substantial. I receive great solace in the fact that it's an important contribution to me and the fraternity. I understand the importance of providing for the future of Sigma Nu and it feels good to know I am supporting those future efforts long after I am gone.



I hope to continue to foster the leadership development of our collegiate members and future alumni who will one day address the growing needs of our country. I have great confidence in the abilities of our Fraternity and our Sigma Nu brothers to make a difference in the world.

We all know there is a great need for leaders in the country. Providing the appropriate funding for the Fraternity to continue to provide training needed to produce those leaders is extremely important. I would urge all Sigma Nu brothers to take a personal inventory and do what you can to provide that support.



Regional leadership training
program for new chapter officers

10

Number of locations

485

Total number of participants

90

Number of undergraduate chapters
and colonies represented



Intense, interactive program
that teaches leadership
and operational excellence to
collegiate chapter Commanders

94%

Percentage of chapters that
attended the College of Chapters

Dr. William S. Spears (Oklahoma State)

“The fraternity experience is important for our nation's future.”

Sigma Nu Educational Foundation (SNEF) received a pledge of \$1.5 million this year from Dr. William S. Spears (Oklahoma State) to build new leadership training facilities on the Sigma Nu Headquarters property. The Spears Family Epsilon Epsilon Center of Excellence will house classrooms, a climate-controlled archives room, and lodging for up to 75 for visiting chapters from around the country.

Dr. Spears became inspired to make this gift after reflecting on the experiences he gained in his own chapter. “I feel indebted to Sigma Nu for the leadership capabilities I developed during my time with the chapter,” he said. “I believe my time with Epsilon Epsilon Chapter shaped me in ways that are still bearing fruit to this day.”

“The fraternity experience is important for our nation's future,” he added.

In June of 2014, Dr. Spears challenged his fellow brothers of Epsilon Epsilon Chapter to match his gift of \$1.5 million by November of that year. His Oklahoma State chapter brothers answered the call and raised the matching funds by the deadline. Nearly 300 brothers of Epsilon Epsilon Chapter stepped forward to contribute.

“It is our expectation that this challenge — this collaborative effort to support Sigma Nu — will be the spark that prompts brothers from other chapters to join what has become a growing coalition of alumni dedicated to making Sigma Nu the most formidable men's fraternal organization in North America,” he said.

For Brother Bill, Sigma Nu was the bridge to adulthood. “It took me from the adolescent years to early manhood,” he says, “and the leadership skills I learned and developed through my fraternity experience have served me for more decades than I want to count.”

Dr. Spears also cited the important role his father and uncle played in encouraging him to join the Epsilon Epsilon Chapter at Oklahoma State. “They were exceptional role models for me,” he said. “This gift honors their memories and the Spears family overall.”

The founding principles of Sigma Nu are of particular importance to Brother Bill, as they align closely with the values his family taught him. “As the first Honor fraternity, Sigma Nu has a set of values that I embraced,” he continued. “They were the same values I was taught in my early years. So the gift honors both the fraternity and my family.”

“This kind of engagement simply confirms what I believe about the lasting positive influence that a Fraternity provides,” Dr. Spears added. “Our members are truly part of a brotherhood: these gifts are tangible evidence that brotherhood lasts.”



Above: Blaid Burgess (UC San Diego) touring the Headquarters Shrine with fellow Sigma Nus from around the country.

19

Collegiate chapters that earned
the Rock Chapter award at the 65th
Grand Chapter in Nashville

\$1,064,166

Dollars raised by collegiate chapters
for philanthropic causes

69

Average chapter size,
which has seen outstanding growth
increasing from 46 in 2008

71%

Percent of chapters reporting use of
LEAD Phase III — the curriculum that
shows members how to put leadership
skills into practice, up from 65% the
previous year

↑ 47%

Percentage increase, since 2008,
in net assets of the Foundation, which
provides funding to the Fraternity
for educational programs.

Mark Nelson (Northwestern)

“Fraternity leaders are in the best position to solve these problems...”

For many undergraduates at my university, college life can feel quite lonely. Hyper-competitive students strive for the best internships, jobs, of graduate school spots with laser focus. Sometimes we're so focused the school seems to lose a sense of shared community.

I was reminded of this recently when I approached a number of professors requesting letters of recommendation for medical school admissions. I received no replies in return.

I followed this by sending similar requests to Sigma Nu alumni, many of them initiates of chapters other than my own. Each of them replied enthusiastically, offering their full support for my career development.

This strengthened my belief that my fraternity experience has been the most meaningful aspect of my college career. Not only for the personal growth I experienced, but also for the constant support I received from others.

Thanks to my fraternity experience my life today stands in stark contrast to what it was in middle and high school. I carried my intense study habits from high school to Northwestern, but my fraternity experience helped me flourish socially. Today I sit on important committees with university administrators, influence school policy changes, and help guide my chapter brothers through life's challenges.

Higher education is currently experiencing serious challenges too. I firmly believe fraternity leaders are in the best position to solve these problems, in partnership with university leadership.

When I left for college the summer before freshman year my dad told me that this time was for education, building lifelong friendships, and discovering yourself. That, at its core, is exactly what the fraternity experience is meant to be and what it has been for me.



Above: Students attending Grand Chapter participate in a session about values-based recruitment. Gifts to the Educational Foundation support a wide variety of educational programs that help student leaders positively influence their communities. This past fall the Fraternity launched its latest educational program, a partnership with 10 other national organizations aimed at sexual assault prevention.

Sexual Assault Prevention

Led by Zeta Tau Alpha Sorority and Sigma Nu Fraternity, interfraternal organizations are taking a stand against sexual assault and relationship violence with the development of a new educational program for college students. Recognizing that everyone plays a role in preventing sexual assault and creating a safer social culture, 10 fraternities and sororities have already signed on to roll out the program nationwide.

To develop a comprehensive approach to prevention, the groups worked with Aaron Boe, the founder of Prevention Culture, which specializes in non-stranger sexual assault and relational violence prevention, healthy relationships, and bystander intervention. The program aims to equip collegians with the tools necessary to create safe and supportive chapter cultures. It covers topics including healthy standards for personal relationships, misconceptions about non-stranger sexual assault, intervention techniques for complicated social situations and ways

to support a victim/survivor. Each group has worked with Boe to customize the program and develop implementation options to meet its organizational needs.

As leaders on campus, Sigma Nu's collegiate members have the power to influence campus culture. Other students take their cues from fraternity and sorority members, and these ongoing programs are preparing them to spark a much needed shift in attitudes among all college students.

Sigma Nu Fraternity has been educating its members to identify and prevent sexual assault for many years, long before recent media coverage brought the problem of campus sexual assault to the forefront of the issues facing higher education. Sigma Nu was influential in calling for the GreekLifeEdu program that prepares students to prevent hazing, sexual assault and alcohol misuse. Sigma Nu was an early adopter of the course when it launched in 2008.

Financial Summary

REVENUE, GAINS, AND OTHER SUPPORT:

a. Contributions, net of present value discount	\$3,815,435
b. Change in net annuity value of split interest agreements	(15,891)
c. Change in present value of interest in trusts held by others	(1,121)
d. Change in cash surrender value of life insurance	10,288
e. Notes receivable interest income.....	84,521
f. Investment income (losses).....	(79,268)
g. Rental and other income	184,079

TOTAL REVENUE, GAINS, AND OTHER SUPPORT \$3,998,043

EXPENSES:

PROGRAM SERVICES:

a. Grants and educational assistance to Sigma Nu Fraternity, Inc.	\$40,536
b. Grants and educational assistance to chapters housing entities	343,012
c. Scholarships and educational assistance to collegiate members.....	107,798
d. Headquarters Shrine.....	334,822

PROGRAM SERVICES SUB-TOTAL \$826,168

FUNDRAISING:

e. Fundraising.....	\$692,822
f. Publications and annual report	25,547

FUNDRAISING SUB-TOTAL..... \$718,369

SUPPORTING SERVICES:

g. Management and general	\$639,441
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SUPPORTING SERVICES SUB-TOTAL \$639,441

TOTAL EXPENSES \$2,183,978

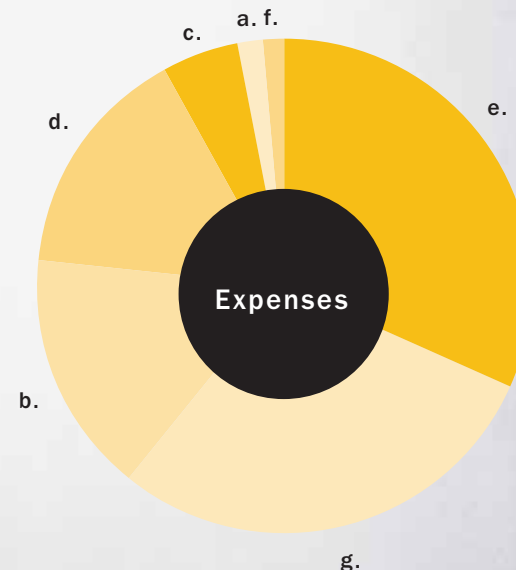
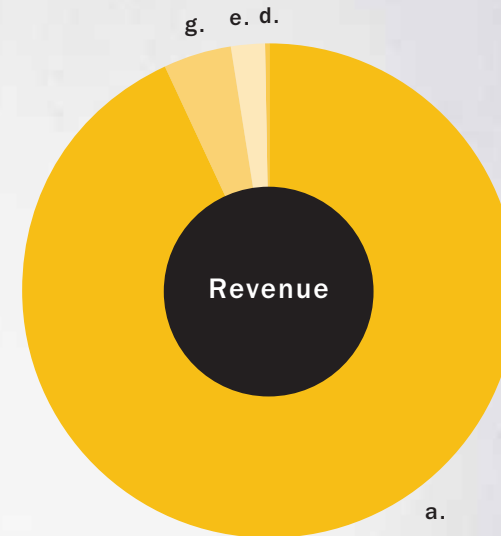
CHANGES IN NET ASSETS \$1,814,065

NET ASSETS, BEGINNING \$9,189,515

NET ASSETS, ENDING \$11,003,580

Fiscal year 2015

Sigma Nu Educational Foundation



We are The Legion of Honor.

We are the men of Sigma Nu.

Together, we have a ...

Commitment to Excellence.



**Commitment to
Excellence**

**Sigma Nu Educational
Foundation, Inc.**

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