

The Phi Sigma Kappa Foundation, Inc. (Foundation) was established in 1947 as the arm of the Fraternity that can receive tax deductible contributions as a qualified 501C3 dedicated to funding the educational programs of the Grand Chapter. Any Phi Sig who has attended a regional conclave, Shonk Leadership School, Zillgitt Leadership Institute, received a national scholarship, or lived in a chapter house whose alumni raised tax deductible funds to remodel or build educational spaces in the house has been enriched by the work of the Foundation. This year the Foundation is also working with the Grand Chapter to create the Albert D. Shonk Jr. Archives and Educational Center at our international headquarters to store, display, and educate visitors about the rich history of Phi Sigma Kappa and Phi Sigma Epsilon.

Following the vision of the Grand Chapter to enrich the undergraduate experience, expand strategically on campuses across the country with emphasis on schools where Phi Sig once had a chapter, and engaging with alumni to foster support for a wide range of educational programming for our undergraduates, the Foundation is proud to play its part in achieving these goals. Each day we work with alumni across the country to make Phi Sig an even greater Fraternity with a positive impact on our members and society.



TABLE OF CONTENTS	Page
Members of the Board of Trustees and Honorary and Emeritus Trustees	2
Gift Impact – Fiscal 2017	3
Chapter House Acquisition and Educational Building Space Support	4
Chapter Advisors Excellence Fund	4
Fiscal 2017 Financial Highlights	5
The Year Ahead – Elements of the Operating Plan	5
Appendix A – Our Supporters	6



# **FOUNDATION BOARD OF TRUSTEES AS OF JULY 26, 2017:**

#### **Executive Committee**

John Sheehan (Northern Illinois University '82) - President Tom Grunwald (Ferris State '91) - 1st Vice-President Pat Murphy (Northern Illinois University '75) - 2<sup>nd</sup> Vice-President Jeff Liesendahl (Northern Illinois University '87) - Treasurer Javad M. Khazaeli (University of Illinois '98) - Secretary

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#### **Emeritus & Honorary Trustees**

Tony Fusaro (Rhode Island '58) - President Emeritus Albert D. Shonk, Jr. (University of Southern Cal. '54) - Emeritus Art Bloomer (Emporia State University '55) - Emeritus David Cohen (Union College '88) - Emeritus Bruce Johnson (University of Illinois '70) - Emeritus Dennis Joyce (Purdue University '69) - Emeritus Chuck Loring (Univ. of Cal. – Santa Barbara '72) - Emeritus Dale Lowe (University of Houston '66) - Emeritus David Towle (San Jose State University '58) - Emeritus Mark Veil (Ferris State '73) - Emeritus Mark Azzarello (Rhode Island '80) - Honorary David Booth (University of North Carolina '74) - Honorary Paul Grane (Northern Illinois University '93) - Honorary Jim Schmitz (Univ. of Cal. – Santa Barbara '80) – Honorary

#### **Staff Supporting Foundation**

Kathy Cannady - Acting Chief Operating Officer Greg DalSanto (Ohio State '14) - Assistant Director of Alumni & Development Marsha Spears – Financial Services Specialist Joe Kern (Radford '09) - Director of Communications



# FY2016 IMPACT: LEADERSHIP EDUCATION, PROGRAMMING & ACHIEVEMENTS

## Albert D. Shonk Undergraduate Leadership School

Leadership training in chapter management, as well as personal development, is provided in annual leadership schools. Named for Court of Honor member and past Phi Sigma Kappa Foundation President Albert D. Shonk, Jr., the Shonk Undergraduate Leadership School is held every year either in conjunction with the General Convention, or as its own educational session. This learning opportunity brings together undergraduates and officers for courses covering their duties as fraternity leaders, and provides a clearing house for new ideas on chapter and college life.

The last Shonk Leadership School was held in Indianapolis from August 3-6, 2016 and had 369 undergraduate participants. A few of the Topics covered included risk management, recruitment, ritual, sexual assault prevention, and mental health.

# Zillgitt Institute

"Leadership for Life" is the mantra of the Robert M. Zillgitt Leadership Institute. The Institute provides education that benefits participants in all aspects of their lives, from fraternity to family, from college to the professional world. As cornerstones, the Zillgitt Leadership Institute explores personal development and awareness, introduces concepts of citizenship and community, and defines elements of leadership.

In the past year Zillgitt Leadership Institute was held in conjunction with Shonk Leadership School in Indianapolis and had 18 elite participants.

## **Regional Conclaves**

Several regional educational conclaves are held each winter in order to expose a large number of undergraduate members to a broad assortment of educational topics ranging from chapter operations and leadership to areas of personal growth. Every chapter and colony sends six or more delegates to the conclave designated for its region of the country. Held on various weekends throughout January and February, expert volunteer officers and members of the International Headquarters staff facilitate the educational sessions.

This past year Phi Sigs had 491 attendees between the 7 regional conclaves.

#### **Good Samaritan Fund**

The purpose of the Good Samaritan Fund is to provide financial support to chapters or colonies in need in order for them to be able to send delegates to the conclaves and leadership schools the Fraternity offers.

This past year 5 chapters requested and received financial support through these funds.



## Scholarships & Grants

The Phi Sigma Kappa Fraternity provided several scholarships, fellowships and educational grants during the 2016-2017 academic year. Scholarship recipients are carefully chosen based upon their academic success, commitment to the ideals of Phi Sigma Kappa and service to their campus, community, and Fraternity. Undergraduate and graduate members are eligible for scholarships and grants.

For the 2016-2017 academic year a total of \$57,452 in scholarships were awarded through a combination of nationally granted funds and individual chapter awards managed by the Foundation.

## GreekLifeEdu – Discusses Sexual Assault, Alcohol, Drug, and Hazing Education

Phi Sigma Kappa is committed to providing ongoing education to our undergraduate members covering the health implications of alcohol and drug use as well as training so our members will be equipped to make appropriate personal and social decisions. GreekLifeEdu provides professionally developed educational material covering these topics. Licensing of the course materials is supported by grants from the Phi Sigma Kappa Foundation.

Over the course of the 2016-2017 academic year, 1,329 undergraduates participated in GreekLifeEdu online courses.

#### Albert D. Shonk Jr. Archives and Educational Center

The Foundation is working with the Grand Chapter to raise the capital to create a museum and education center at the headquarters building that will be known as the Albert D. Shonk Jr. Archives and Educational Center. This facility will be home for Phi Sig's history and memorabilia. It will be an active education center welcoming Phi Sig and others to learn of the rich history of Phi Sigma Kappa and Phi Sigma Epsilon.

# Chapter House Acquisition & Educational Space Building Programs

In support of the Chapter at **Purdue**: The Foundation has accepted tax deductible gifts (now over \$819k raised) for the construction of a new chapter house. The Foundation is safeguarding these funds and will manage their eventual disbursement for educational space related construction costs.

Foundation Trustee Jim McNamara led the effort to gather tax deductible donations and a loan from Phi Sigma Kappa Properties to purchase the first chapter house Phi Sigs at **University of Central Missouri** have ever owned. It will be known as the Whitfield Leadership Education Center and host educational programming for university students and the community while also serving as a chapter house.

# Creation of Adviser Excellence Fund

After receiving a request for financial support from a group of alumni brothers travelling to colonies and chapters in the southeast to provide educational support, the Foundation worked with the Grand Chapter to create the Advisers Excellence Fund. This fund will provide grants to subsidize travel expenses for Grand Chapter recognized volunteer alumni engaged in visiting chapters and colonies and providing educational instruction to our undergraduates. Chapter operations, recruitment, officer development, chapter house management, financial management, social and interpersonal development, and fraternity history are all areas mentoring volunteer alumni provide support our undergraduates. This fund will support their invaluable efforts.



# **FY2017 FINANCIAL HIGHLIGHTS:**

The Foundation operated most of fiscal 2017 without a director of development or other full time fundraiser. This impacted unrestricted donations and fees received which decreased from the prior fiscal year to \$225,083 from \$273,929. While revenues were down The Foundation also had lower expenses, which lead to revenues exceeding expenses before depreciation and resulting growth in unrestricted corpus of \$4,085 while still satisfying all obligations and grant requests from the Grand Chapter.

The 2017 fiscal year saw total donor support and other revenue of \$937,467 versus \$839,785 in FY2016. Of the FY2017 revenue, \$586,980 was in the form of temporarily restricted gifts in support of specific chapters and projects. This compares with \$461,275 in temporarily restricted gifts received in FY2016.

Included in revenue numbers are earnings from the Foundation's investments in marketable securities and other liquid instruments which provided \$67,579 in funding from a pool of diversified investible assets of \$658,703. This was a 10.3% return on investment. While the Foundation manages \$1,651,862 in liquid assets, a significant portion of these funds are temporarily restricted and potentially needed in the short term for building projects. These funds are held in cash equivalents and CDs with almost no market risk.



# THE YEAR AHEAD - ELEMENTS OF THE OPERATING PLAN:

As we begin fiscal 2018 the Foundation will continue to execute its operating plan which includes these significant elements:

- Working with the COO and filling the position of Director of Development
- Cultivating past and future donors to increase fundraising
- Run effective direct mail and related Signet campaigns
- Strategically add trustees and associate trustees that can support the goals of the Foundation and Fraternity
- Arrange and execute alumni receptions to engage alumni with their Fraternity
- Expanding alumni engagement on a regional basis to cultivate donors
- Establish a "National Day of Giving" for Phi Sig
- Execute a capital campaign in support of the Albert D. Shonk Jr. Archives and Educational Center

# What we do is only possible because of the generous support of brothers, families, and friends like each of YOU!

The Foundation thanks the brothers, families, and friends that provided their treasure, time, and talent to achieve all that was possible this past year. We are excited to continue our journey in support of the Grand Chapter's mission and goals and are doing everything we can to enrich our undergraduates' education and learning experiences as active Phi Sigs, by engaging with our alumni and contributing to a community of care and support for our chapters and each other.

We are a Fraternity founded on the Golden Rule. Working together with this bright star as our guiding light – all things are possible.

By These Things We Stand, Fraternally and Respectfully Submitted,

John P. Sheehan '82 Foundation President

Kathy Cannady Acting Chief Operating Officer Phi Sigma Kappa Fraternity



# PHI SIGMA KAPPA FOUNDATION, TRIPLE T'S SOCIETY DONORS IN THE 2016 - 2017 FISCAL YEAR JULY 1, 2016 - JUNE 30, 2017

The Triple T's Society is open to all members and friends of Phi Sigma Kappa who give at least \$250 in gifts to the Phi Sigma Kappa Foundation during the year. The trustees of Phi Sigma Kappa Foundation express their appreciation to these loyal and generous donors. Names are listed in alphabetical order. Both donors supporting the national educational programming of the Fraternity as well as donors supporting chapter specific educational programs and educational building spaces are recognized.

# Platinum Level (Gifts Totaling \$20,000 and higher)

John P. Beck (Purdue '55)
David J. Carter (Purdue '66)
Gary F. Ervin (Central Missouri '80)
Paul L. Grane (Northern Illinois '93)
Don A. Kuhn (Purdue '61)
E. Dale Lowe (Houston '66)
Richard L. Schleicher (Purdue '59)
Albert D. Shonk, Jr. (Southern Cal '54)

#### Diamond Level (Gifts Totaling \$10,000 - \$19,999)

John F. Brock III (Georgia Tech '70)
K. Wade Carpenter (Central Missouri '89)
David M. Franzman (Purdue '80)
Jeff Liesendahl (Northern Illinois '87)
Frank B. Micheletti (Purdue '63)
Amanda Moritz
Phi Sigma Kappa Properties, Inc.
Dan D. Power (Central Missouri '73)
John P. Sheehan (Northern Illinois '82)
Signet Circle Corporation
Samuel W. Staples (Purdue '55)

#### Sapphire Level (Gifts Totaling \$5,000 - \$9,999)

Lary R. Aldrich (Purdue '78)
William A. Bloomer (Emporia State '55)
Chad E. Burney (Central Missouri '05)
David L. Cohen (Union '88)
David F. Eichenauer (Purdue '62)
Frederick M. Hausmann Jr. (Purdue '81)
Dennis M. Joyce (Purdue '69)
Dr. Sloan L. Robertson (Arizona '69)
David L. Towle (San Jose State '58)
Karl L. Zimmermann (Purdue '56)

#### Emerald Level (Gifts Totaling \$2,500 - \$4,999)

James L. Arneson (Purdue '60) J. Tom Avery, Jr. (Purdue '82) Mr. Mark M. Azzarello (Rhode Island '80) Douglas M. Burghardt (Purdue '63) David R. Butcher (Purdue '62) Michael L. Fatta (Northern Illinois '82) Anthony Fusaro (Rhode Island '58) Thomas Grunwald (Ferris State '91) W. Ben Havird (South Carolina '06) Charles R. Idol (Houston '68) David W. Jones (Emporia State '98) Michael J. McDonald (Purdue '66) David T. McNaught (Indiana '64) Mary & Michael Moritz PSK Alumni Assn. of Northern IL Gene F. Seevers (Central Missouri '51) Signet Corporation of Santa Barbara R. Todd Simpson (Central Missouri '86) Larz Smith (Purdue '70) Joe C. Trevino (Purdue '69) Lash Turville (San Jose State '61) James Visnic (Youngstown '77)

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Adam C. Carter (Hobart '90)
Dale D. Deardorff M.D. (Purdue '70)
Bob D. Fox (Purdue '57)
Gerald L. Limp Leadership Endowment Fund
Bud G. Hanna (Ferris State '70)
James S. Harrison (Purdue '71)
James A. Manos EdD (Southern Cal '54)
William S. Meyer (Purdue '52)
Patrick T. Murphy (Northern Illinois '75)
Robert A. Phillabaum USA (Ret.) (Purdue '58)
Edgar C. Schiffer (Purdue '51)
Ralph L. Schowe (Purdue '52)
Paul J. Smeller (Purdue '63)
Ernest R. Vibbert (Purdue '68)



# Ruby Level (Gifts Totaling \$1,000 - \$1,749)

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John E. Ayers (Purdue '63)

Darren Azarian (Southern Cal '94)

Thomas J. Boldrick III (Purdue '83)

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William L. Brachat (Purdue '66)

Dave J. Breazzano (Union '78)

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Charles V. Loring Charitable Fund at Our Fund

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Anthony A. Curtis (George Washington '90)

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Jonathan Dugdale (Indiana '07)

Richard J Eickemeyer (Purdue '82)

Jon M. Frain (Indiana '07)

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Gregg A. Grote (Purdue '83)

Judge Richard Hall (Houston '65)

Robert L. Harman (Mansfield '76)

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Kirk B. Hoggatt (Purdue '66)

Derek E. Holmes (Robert Morris '89)

William G. Hummel (Purdue '70)

Scott Jacobson (Cal Poly '01)

Allan H. Johnson FSA (Illinois '73)

Javad M. Khazaeli (Illinois '98)

Christopher R. Knott (Purdue '04)

Colby B. Leathers (Alabama '95)

T. Scott Lyons (Alabama '95)

John M. Mattingly (Gettysburg '62)

Kenneth J. Merkt (Wisconsin/Milwaukee '68)

Robert Morgan (Central Missouri '84)

Albert F. Moritz

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John R. Murphy (Purdue '89)

Michael Palm (Indiana '04)

Pi Pentaton

Brian P. Pietrandrea (Clarion '97)

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Wesley J. Poynor (Texas '72)

Dennis C. Rilling (Oregon State '71)

Glenn M. Roby (Northern Illinois '91)

Robert G. Rose (Purdue '74)

Jim R. Schmitz (UC/Santa Barbara '80)

Mark A. Seifried (Central Missouri '82)

Mark W. Viel (Ferris State '73)

Wayne A. Walker (Purdue '66)

Wayne A. Ward (Towson '93)

Bennett Williams (Indiana '07)

Thomas S. Wright (Wisconsin/Milwaukee '92)

#### Pearl Level (Gifts Totalina \$500 - \$999)

Robert L. Balogh (Michigan '80)

William L. Bauer (Rutgers '60)

Mary Briggs

Ryan Hans Budke (Delaware '12)

Keith P. Buehler (Purdue '80)

Jeffrey A. Butler (Northern Illinois '83)

Virginia & Arthur Carr

James T. Craig, Jr. (Alabama '60)

Sean B. Eaves (Midwestern State '93)

Michael T. Eaves (Kentucky '94)

Beth & Peter Edelstein

Herb Eldean (Northern Illinois '63)

John W. Everest (Alabama '69)

Jonathan T. Georgis (Illinois State '86)

Carl W. Goltermann (Illinois '74)

Kenneth J. Green (Northern Illinois '84)

Robert H. Gunn, Jr. (Georgia Tech '60)

Kenneth A. Hall (Ferris State '68)

Brian L. Hoffbauer (Purdue '95)

Mykle C. Jacobs (Ferris State '70)

Bruce C. Johnson (Illinois '70)

Seline Jung

John Krzywicki

Steve R. Laukhuf (Midwestern State '84)

Richard A. Lejk (Georgia Tech '55)

Drew Malcomb (Tennessee/Martin '75)

Robert J. Mauro (Rensselaer '78)

Keith R. Meier (Florida State '92)

Daniel Mills (Ferris State '88)

Donald J. O'Brien (Connecticut '51)

James R. Ochu (Northern Illinois '87)

Max A. Ordonez (Cal State/LA '92)

Timothy J. Ostrowski (Northern Illinois '74)

Rocco P. Pannella (Connecticut '63)

Michael L. Petitjean (Emporia State '70)

Matt M. Pilcher (Maryland '00)

Daniel J. Pomerening (Georgia Tech '75)

Peter G. Popoff (UC/Santa Barbara '69)

Ronald J. Pugh (Texas '68)

Leonard H. Ralston (Washington State '58)

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Larry E. Sheffield (Ohio State '64)

Sean Shingler (George Mason '97) Sam J. Soffa (Wisconsin '57)

Timothy A. Spiegel (Northern Illinois '91)

Gregory R. Stack (Kentucky '89)

Leonard C. Suchyta (Detroit '65)

John D. Tickle (East Tennessee '62) Tatsuo Tomura

William Vanderpool (Central Missouri '98)

Hector M. Verde (Purdue '89)

Matt Waltz (Marian University '02)

Bruce Wells (Purdue '86)

Mark F. Wille (Southern Cal '77)

Jon D. Williams (Michigan '88)

James M. Wolf (Dayton '87) Leslie D. Young (Maryland '62)



**Gold Level** (Gifts Totaling \$250 - \$499) Behrouz Abedian Lary L. Acker (Maryland '57) Air Park LGA, Inc. Anthony S. Ameri (Northern Illinois '93) David B. Amy (Robert Morris '74) Dean G. Anderson (Northern Illinois '73) Joshua R. Aplina (Purdue '03) Tim Ryan Aquinto (Ferris State '10) Ronald G. Assaf (Akron '57) Dr. Drury G. Bagwell (Tennessee '64) Maurice E. Baker (Purdue '57) Deborah Barlow Luke Benedict (Clarion '01) John A. Benkovich (Georgia Tech '60) Henry B. Blackwell II (Illinois '52) Robert J. Bohrer (Cal State/Fullerton '79) Sean D. Bond (Ball State '94) Leon A. Boulavsky, Jr. (Maryland '75) Steven H. Brose (Penn State '69) R. M. Brown (Minnesota '84) James M. Bryner (Illinois '71) Kathy Cannady Richard S. Carron (Purdue '62) Tim Childers (Northwest Missouri State '00) Steve L. Cutaia (Western Illinois '90) Mark H. Dahlmann (Clarion '76) Kevin D. Donovan, Jr. (Cal/Berkeley '74) Donald V. Dotts (Arizona State '57) William W. Dudman (Florida Southern '87) Matthew Dunn (Indiana '08) Epsilon Lambda Alumni Chapter Joseph G. Farias (FDU/Madison '12) Victor M. Fernandez (Illinois '97) Todd A. Feuerman (Towson '87) Mark D. Fisk (Purdue '91) Lance A. Fox (Ferris State '92) David R. Frank (Northern Illinois '92) David Galatte (Northern Illinois '90) Dennis M. Gardner (Central Missouri '85) Gerry D. Getman (Florida Southern '69) Alan T. Girton (Ball State '87) William J. Glass (Illinois '83) George L. Glotzbach (Minnesota '53) Scott W. Gordon (UC/Santa Barbara '79) William P. Green (Washington '82) Walter J. Groman, Jr. (Tennessee '81) Martin F. Grossman (Rhode Island '60) John Guido, Jr. (Northern Illinois '95) Steven A. Gyory (Union '76) Sean P. Hamilton (Stetson '89) Grea Hammon (Memphis '92) Austin N. Harris (Virginia Tech '09) Kurt E. Hauseman (Northern Illinois '88)

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Robert O. Jacobs (Hobart '80)

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