PI BETA PHI FOUNDATION
CAMPAIGN PROSPECTUS
DRAFT

Working Together to Create Pi Beta Phi’s Next 150 Years
To Our Stakeholders

PI BETA PHI IS A PREMIER FRATERNITY FOR WOMEN

What do you think Pi Beta Phi’s Founders sought to create in that small, Monmouth bedroom nearly 148 years ago? A Century of Friendship tells us they “wanted something better,” but do you think they could have begun to imagine what that “something better” would possibly become?

Those 12 brave, bold young women launched a movement that is thriving still today. Pi Phis are leaders on our campuses, in our communities, in our professions and in our homes. Our members are the living legacies of the ideals those women created to promote friendship, develop women of intellect and integrity, cultivate leadership potential and enrich lives through community service.

THE NEXT 150 YEARS

As we prepare to celebrate the past 150 years, we also must look to the future and what it holds for Pi Phis in our evolving world. The Fraternity and the Foundation have a collective vision for our sisterhood, and working together we aspire to advance the mission and values of Pi Beta Phi over the next 150 years.

The vision of Pi Beta Phi Fraternity for Women is to be recognized as a premier organization for women by providing lifelong enrichment to its members and contributing to the betterment of society.

Our organization and our members have done so much good work, but premier organizations don’t stop. There is more to be done. The Pi Beta Phi of today — and tomorrow — demands:

- Members who are prepared and challenged to lead in collaborative and creative ways
- Access to increasingly expensive education — for collegians and alumnae
- Philanthropic efforts that promote a lifelong love of reading
- Competitive collegiate housing that promotes living and learning communities
- Preservation of our heritage to honor our past and advance our future

The experiences we offer, the skills we teach, the relationships and connections we encourage — every single thing we do is designed to intentionally help our members, our sisters, become the very best version of themselves they can be.

We aspire to achieve our vision and provide the very best for our sisters by increasing our endowed financial resources to create premier experiences and secure the future of our sisterhood in perpetuity.
WORKING TOGETHER TO INVEST IN OUR FUTURE

We are embarking upon a $20,000,000 comprehensive campaign to secure the future of Pi Beta Phi by raising endowment funds and current use dollars for a few priority projects. With a lead gift commitment of $6,000,000, we are well on our way to success! With additional gifts and bequests through this campaign we will add a total of $20,000,000 in new funds to our endowment, and benefit from $800,000 new grant-making dollars every year.

However, this effort is not only about the dollars we will raise; it is about the quality of leaders we will develop, the new academic pursuits we will support, the number of Pi Phis who will have a premier housing experience, the love of reading we inspire and, ultimately, the number of women who will benefit from membership in Pi Beta Phi.

We ask you, one of our most committed, loyal supporters to help us champion this effort. As you read through this outline of funding priorities, we hope one or more will connect with your personal philanthropic passions and reflect the social change you wish to see in the world.

Paula Pace Shepherd  
*Texas Epsilon*
Fraternity Grand President

Beth Seidelhuber Sordi  
*California Kappa*
Foundation Board President
Leadership

Our members require the innovative training and the tools necessary to lead in the 21st Century. Today, we are only able to provide national leadership training programs for less than 5 percent of our collegiate members. Yet, we know our members are craving the opportunity to learn new skills, collaborate with their peers and test their leadership theories. **We aspire to provide a fully-funded leadership training experience annually for at least 25 percent of our collegiate membership by 2020.** Currently, the Foundation manages one endowed fund to supplement leadership initiatives offered by the Fraternity that generates less than $3,500 annually for leadership programming. Therefore, we have identified the following priorities for funding:

**LEADERSHIP ENDOWMENT**

As the Fraternity continues to grow its national leadership development experiences, proceeds from this endowment will be used to make those experiences possible. Rather than dictate a specific program, proceeds will be used at the Fraternity's request to support programs like Leadership Academy, Emerging Leaders Programming, Leading with Values® (including new initiatives such as Critical Conversations™) or any future leadership program.

**CHAPTER ASSISTANCE ENDOWMENT**

Pi Beta Phi strives to provide every Pi Phi a premier membership experience and goes to great lengths to provide personalized assistance to all chapters. Leadership Development Consultants provided more than 1,000 hours in individual, personalized mentoring for chapter officers in just one semester. This endowment will create perpetual support for the Fraternity’s Leadership Development Consultant program, chapter support officer initiatives or any future chapter assistance programs developed to meet emerging needs.
Scholarship

Scholarships put academic achievement at the center of our membership experience. Founded to develop women of intellect and integrity, access to personal and intellectual growth through education is a core value. Today we award $355,000 in scholarships annually; while having significant impact, it is almost 50 percent less than our largest awarding NPC counterparts. **We aspire to increase our annual scholarship awards to $575,000 by 2020 — making Pi Beta Phi a leader among NPC member groups.** Therefore, we have identified the following priorities for funding:

**FOUNDERS AWARDS**

A Founders Award is the highest academic honor Pi Beta Phi can bestow on a member; each award will provide a $10,000 scholarship annually. We have identified an opportunity to fund 12 undergraduate scholarships or graduate fellowships, one for each founder; criteria for selection may be based on the unique traits of each founding woman.

**GRADUATE FELLOWSHIPS**

Keeping up with the costs of graduate education today, we aspire to provide $10,000 graduate fellowship awards to Pi Beta Phi alumnae who exemplify our commitment to intellect and integrity. We have identified opportunities for ten graduate fellowships (including two designated as “Founders Awards”); criteria for selection may be based on service to the Fraternity, leadership in the community and academic performance.

**ADDITIONAL SCHOLARSHIP AWARDS**

Continuing our tradition of chapter specific awards, we have identified opportunities to grow existing current use scholarships into endowed funds or to create new endowments.

<table>
<thead>
<tr>
<th>IMPACT OF NEW SCHOLARSHIP ENDOWMENTS</th>
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<tbody>
<tr>
<td><strong>Type</strong></td>
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<td>--------------------------------------</td>
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<tr>
<td>Founders Awards</td>
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<tr>
<td>(Undergraduate and Graduate)</td>
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<tr>
<td>Graduate Fellowships</td>
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<tr>
<td>Other Scholarship Awards</td>
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<tr>
<td>New Scholarships Total</td>
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*Data is provided for illustration purposes only, income, not principal, will be used to sustain the investment over time. Estimates are based on fully funded endowments with a spending rate of 4%.*
Literacy

Pi Beta Phi has a more than 100 year commitment to philanthropic service. Today, our commitment to enriching lives through community service is realized through our efforts to champion literacy in our society. We believe in the power of reading, and know that inspiring a lifelong love of reading can unlock true potential creating a more literate and productive society. However, functional illiteracy continues to be a systemic issue. Data tells us that one in four children will grow up functionally illiterate. And that is one too many.

We believe in inspiring readers, sparking imaginations and igniting the desire to learn. Pi Beta Phi has already invested more than $1,000,000 in literacy causes across the country and more than 1,000,000 books to children in need. We aspire to impact a total of 1,000,000 more lives through our Read > Lead > Achieve® initiatives by 2017.

Today, Pi Beta Phi Foundation has no endowed funds to support Pi Phi’s commitment to literacy. In the near future, we will be asking ourselves “what’s next for encouraging more reading in our world?” In order to provide answers to this question, we will need financial resources to implement sustainable solutions. Therefore, we have identified the following priority for funding:

LITERACY ENDOWMENT

An endowment within The Literacy Fund will provide a permanent, lasting tribute to Pi Phi’s commitment to literacy. We have changed with the times, but have never shifted our vision. Rather than dictating a specific program, proceeds from this endowment will be used in perpetuity to support the Fraternity’s efforts to create innovative programs that lead to a more literate and productive society.
Housing

Building community is integral to a positive member experience as a collegian. Our chapter facilities are our most valuable assets and also our biggest liabilities. For this reason, Pi Beta Phi housing strives to ensure that all of our facilities are premier. With this comes the priority of safety and security. This is achieved by providing exemplary guidance and support in all aspects of facility operations. In order to stay competitive on campus, we aspire to create and fund solutions to improve housing conditions and build new houses on campuses where extension or Greek Villages are opportunities, within the confines of tax code limitations. Therefore, we have identified the following priorities for funding:

**HOUSING TECHNOLOGY ENDOWMENT**

Technology is one of the top two reasons Pi Phi undergraduates say they are not satisfied with their housing experience, due to a lack of access or need for upgrades to access of the internet. We believe technology grants will ultimately provide a more satisfied undergraduate member. Funds from this endowment will be available to Pi Beta Phi facilities (houses, lodges or suites) to help with the expenses for technology infrastructure. In addition to increased member satisfaction, this effort will improve the study conditions for resident and non-resident members alike.

**FUNDRAISING EDUCATION AND TRAINING FUND**

Chapter House Corporation (CHC) boards are local alumnae volunteers who own and maintain Pi Phi facilities. In order to renovate or expand current facilities, the CHC must execute a capital fundraising campaign to generate the funds needed for renovations or expansion. Not only is fundraising expensive, it is also very time consuming and requires specialized skills. This fund would allow the Foundation to provide this expert service to our local alumnae volunteers by increasing staff capacity. Staff support would not only mentor local house corporations in fundraising best practices, but also create an education and training program to help support successful housing fundraising campaigns.

**CHAPTER HOUSE IMPROVEMENT PROGRAM (CHIP)**

A CHIP is a chapter-specific fund used to reimburse a CHC for general qualified improvements and expenses, one time or annually. Alumnae can make tax-deductible contributions in support of their chapter directly to the Foundation. While types of qualifying expenditures are currently limited by tax codes, a CHIP can help meet the qualified needs of both donors and CHCs. A gift of $10,000 is required in order to establish a CHIP, although ongoing donations may be of any amount.
Heritage

Understanding our past is not just about artifacts or a building, it’s about the stories of who we are and where we came from – original stories from a time when women were denied full rights in our society. Pi Phi’s Founders were young women who inspired an entire movement. To honor their legacy and ensure our heritage is always part of our present-day reality, we aspire to invest in the preservation of Pi Phi’s history and historical structures with both a permanent endowment and current use funds. Therefore, we have identified the following priorities for funding:

**HERITAGE FUND ENDOWMENT**

This endowment will directly support archive improvements and other historically significant priorities. Funds could be used specifically for enhancing the Fraternity’s archive both online and at Headquarters, historic preservation or renovation projects at Holt House and other priorities as identified.

**FOUNDERS GARDEN FUND**

Holt House is a vital piece of Pi Beta Phi’s legacy and has been a longstanding priority for philanthropic investment. Who knows where our organization would be if not for the conversations in that small, upstairs bedroom. The Holt House Committee has identified the opportunity to create a Founders Garden to serve as a tribute to our Founders and a unique outdoor venue for chapters, clubs and community organizations that hold events at Holt House. The Founders Garden Fund would be an expendable fund rather than an endowment, and the project will not proceed without a $75,000 investment.
Operations

Operating endowments are the lifeblood of any sustainable non-profit organization. Income from our unrestricted endowments will ensure that we continue to thrive, even during lean economic times, grow internal capacity and leverage philanthropic investments over time. **We aspire to create an operating endowment with $1,000,000 in new gifts by 2020.** Therefore, we have identified the following priority for funding:

**OPERATING ENDOWMENT**

This endowment will provide resources in perpetuity. Building on the sustainability we are afforded by our most loyal and consistent donors, we seek to endow those annual gifts through deferred giving arrangements.

Every Gift Counts

There are many ways to give including cash and non-cash assets, current and deferred arrangements, as well as giving arrangements that allow you to receive income during your lifetime and benefit Pi Beta Phi and your other charitable interests at your death. Payment of cash pledges can be spread over five years. Our team of development professionals can work with you, your family and/or your advisors to create a charitable giving plan that best suits your financial and charitable goals.

Giving should be rewarding and meaningful, even fun, and we are committed to celebrating and stewarding all philanthropic investments in ways that are personally significant to you.
Our New Endowment Investment at Work

Additional annual distributions from endowment investments by 2020.

<table>
<thead>
<tr>
<th>Endowment Category</th>
<th>New Endowment Gifts</th>
<th>New Annual Distribution <em>(Based on 4% annual spend rate.)</em></th>
<th>% Increase in Endowed Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heritage</td>
<td>$500,000</td>
<td>$20,000</td>
<td>100%</td>
</tr>
<tr>
<td>Housing</td>
<td>$750,000</td>
<td>$30,000</td>
<td>100%</td>
</tr>
<tr>
<td>Leadership</td>
<td>$8,000,000</td>
<td>$320,000</td>
<td>9900%*</td>
</tr>
<tr>
<td>Literacy</td>
<td>$4,250,000</td>
<td>$170,000</td>
<td>100%</td>
</tr>
<tr>
<td>Operations</td>
<td>$1,000,000</td>
<td>$40,000</td>
<td>100%</td>
</tr>
<tr>
<td>Scholarship</td>
<td>$5,500,000</td>
<td>$220,000</td>
<td>62%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$20,000,000</strong></td>
<td><strong>$800,000 annually</strong></td>
<td></td>
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</tbody>
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*The current endowed fund is approximately $80,000. An $8 million endowment would provide a 9900% increase in endowed funds available for leadership programming.

For more Information

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