

CHANGING LIVES

THE \$10 MILLION CAMPAIGN FOR CHI PHI



The day you became a Chi Phi . . .

something changed forever. It started with the bond you formed with your brothers in college, making memories and forging friendships for a lifetime.

But it didn't end there. From the day you received your badge, you also answered the call to be your best, to build your life on the principles of truth, honesty and personal integrity . . . principles held sacred since our founding in 1824.

Chi Phi changed your life. It set you on your path. With your commitment once again, Chi Phi will raise \$10 million through the *Changing Lives Campaign* and provide this same life-changing experience to generations of young men across America.



ACADEMICS | LEADERSHIP | CHAPTER EXCELLENCE | HERITAGE

www.ChiPhiCampaign.com

Yesterday





OUR PROUD HISTORY

Those before us founded the Princeton Order in 1824 - conceiving the idea of a secret Brotherhood based on friendship.

They selected like-minded individuals to join the ranks - men who believed in the principles of truth, honor and personal integrity, and visibly demonstrated these beliefs in both character and action - through their friendships with each other and their relationships with fellow man.

In earlier times, the church, schools and literary societies served as havens for men to associate with one another. However, strife and lack of organization among those groups brought about the need for a new rallying point.

So, it was no coincidence that the Princeton Order, the Southern Order and the Secret Order at Hobart all formed in the same time period, unbeknownst to each other.

Gradually, those rallying points took form and joined to become what we now call our Fraternity - an enduring association of men, our Brothers in Chi Phi.

With pride in our past, it is appropriate to look to our future. To advance and remain relevant, we must raise \$10 million to continue our record of accomplishment.





ON THE VERGE OF GREATNESS

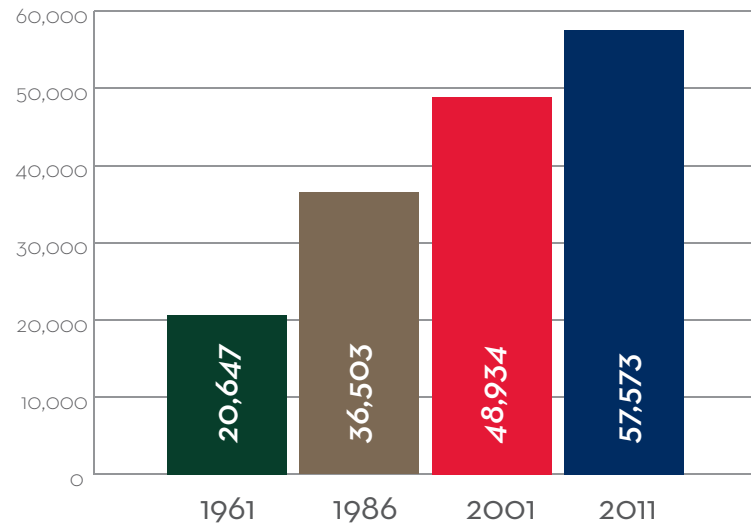
Since 1975, Chi Phi's membership has more than doubled. Just 36 years ago, we served 28,871 undergraduates and alumni. Today, there are more than 57,000 members. Chi Phi has seen its volunteer efforts, administrative tasks and educational responsibilities grow exponentially. Success in this ambitious \$10 million capital campaign enables us to continue offering a top-quality Chi Phi experience to every man who belongs and believes.

The model for Greek life is also changing. Leading students look for a fraternity that enhances their collegiate experience outside of the classroom . . . one that serves as a launch pad to a successful career.

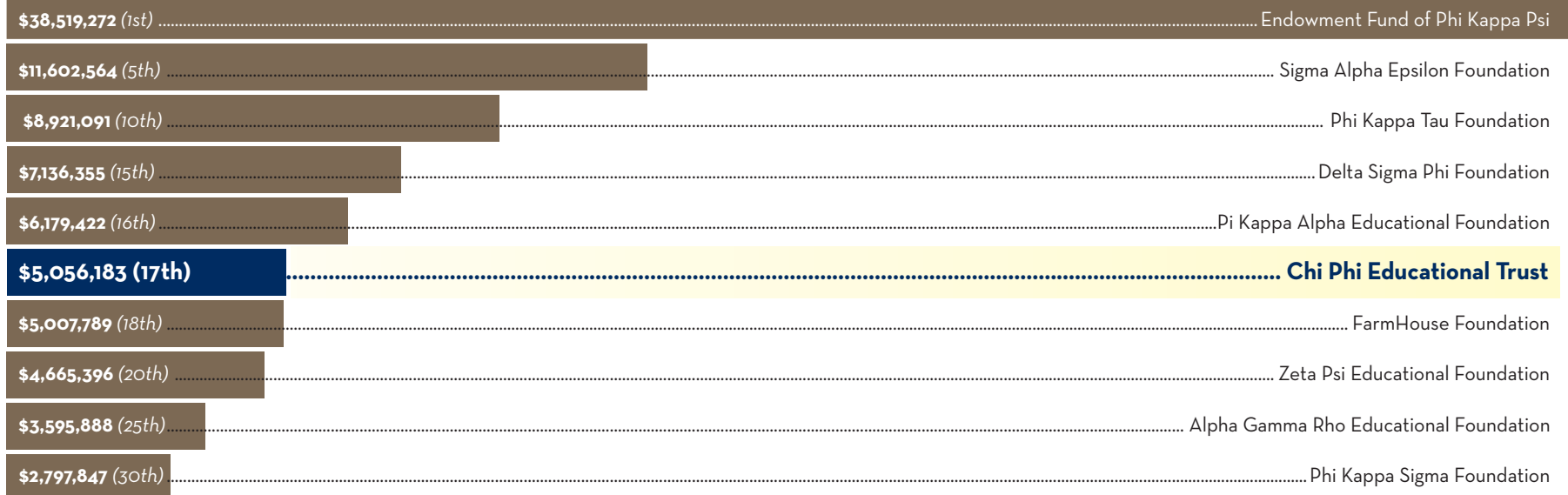
At the forefront of the future of Greek life is Chi Phi - creating an authentic, values-based experience at America's leading institutions of higher education. Innovative leadership curriculum, alcohol education, the award-winning College of Excellence and a focus on supporting our students and Chapters at the grassroots level are all hallmarks of Chi Phi today.

Today

CHI PHI - THEN & NOW: *Number of Initiates*



COMPARISON OF NET ASSETS



A Plan for the Future

Chi Phi prepares young men for the rigors of undergraduate life and the world after college. Yes, there's a lot of fun along the way, but Chi Phi provides a support system and a network. Chi Phi builds better men. Chi Phi changes lives. But, we can do more.

This campaign provides an opportunity for all Chi Phi alumni, parents, students and friends to change the lives of Chi Phi men for generations to come.

Public philanthropy makes the difference between being average and being great. That's what this capital campaign is about. It's about taking the next step, realizing our potential and changing the lives of the young men entrusted to our care.

The time has come and the call is clear. Brothers from every era are stepping up to ensure academic success, build better leaders, promote Chapter excellence and preserve our distinction and heritage as the oldest social fraternity in America. That call to action is a renewed pledge, a pledge to contribute ... and the rallying point is this capital campaign destined to change lives forever.

By 2014, Chi Phi will raise \$10 million to:

CREATE ACADEMIC SUCCESS

Donor-Restricted Scholarships.....	\$400,000
General Scholarship Fund.....	\$500,000
Educational Space in Chapter Houses.....	\$1,500,000
	<hr/>
	\$2,400,000

BUILD BETTER MEN

Total Membership Education	\$1,000,000
College of Excellence.....	\$1,000,000
Alpha Academy.....	\$500,000
	<hr/>
	\$2,500,000

PROMOTE CHAPTER EXCELLENCE

..... \$2,100,000
Create, at minimum, a \$25,000 restricted fund for every active Chapter

PRESERVE OUR HERITAGE

Chi Phi Greek Life Museum.....	\$500,000
Unrestricted / Quality Enhancement Funds.....	\$1,500,000
The Chi Phi Annual Fund	\$1,000,000
	<hr/>
	\$3,000,000



Create Academic Success

Goal: \$2.4 million

With the support of our alumni, parents and friends, the *Changing Lives Campaign* will endow academic scholarships to help our Brothers continue their education. We'll also build and renovate educational space in chapter houses across the country.

Build Better Men

Goal: \$2.5 million

Along with the rest of the Greek world, Chi Phi faces challenges that compel us more urgently than ever. Risk management problems, academic performance, substance abuse challenges - the issues the Greek world has grappled with in recent years - threaten Chi Phi as well.

Total Membership Education, the College of Excellence and an expanded Alpha's Academy are at the forefront of our response. Designed to refocus Chapters and members, these innovative leadership development programs prepare students to lead not only their Chapters, but their campus and communities long after graduation.

In 1988, Chi Phi began the Krannert Leadership School, and it evolved into the amazing personal growth experience that is known today as the **Chi Phi College of Excellence**. Twenty-three years and nearly three thousand participants later, this award-winning event is a nationally-recognized program and Chi Phi's pinnacle leadership development event.

Total Membership Education is our recent effort to develop and implement curriculum that impacts every Chi Phi student through every aspect of their relationship with us. Encompassing multiple programs and delivery methods, Total Membership Education provides new member resources, the Regional Leadership Alliance, National Volunteer Training, Chapter officer and member consultation visits and more.

Realizing that strong leaders set the direction for the entire organization, Chi Phi hopes to spin-off the successful and highly popular **Alpha Academy** session from within the annual Regional Leadership Alliance into its own, stand-alone program. The goal is to bring every Chapter President together once a year for training, goal-setting, personal growth and development.

Giving Opportunities

OUTRIGHT GIFTS & PLEDGES PAYABLE OVER FIVE YEARS

- Cash
- Check
- Debit / Credit Card
- Money Order
- Corporate Matching Gifts
- Stock
- Bonds
- Other Appreciated Securities

Annual gifts of \$2,000 and higher qualify donors for membership in the Gladfelter Circle.



GLADFELTER CIRCLE

DEFERRED / PLANNED GIFTS

- Bequest
- Charitable Trust
- IRA Transfer or Beneficiary Designation
- Life Insurance
- Retirement Plan Beneficiary Designation

Everyone making a planned gift of \$10,000 or more becomes an honored member of the MacLean Legacy Society.



Promote Chapter Excellence

Goal: \$2.1 million

Chi Phi recognizes that to build better men, we must build better Chapters. Chapter strength has a direct impact on the quality of one's undergraduate experience. Chapter Excellence Funds provide a mechanism for Alumni to make tax-deductible contributions to a restricted account that can only be spent on funding scholarships and educational grants for members of a particular Chapter.

A central focus of the *Changing Lives Campaign* is to help every Chapter establish a fund of at least \$25,000 for their long-term use and support.

Many Alumni often ask, "why should I make a gift to my Chapter's Chapter Excellence Fund when I can make that gift directly to my Chapter or alma mater?" Consider these four answers:

1. Your gift will be handled by responsible Trustees to ensure that the money is used for its intended purpose and is invested wisely.
2. Your gift establishes a long-term reserve for your Chapter to draw upon for educational purposes and future house construction and renovation loans. This effectively minimizes the need for frequent appeals to Alumni.
3. Your gift is not "held hostage" or subject to intense bureaucracy the way it might if it is subject to the fickle rules and management styles of changing alumni advisors or university administrators.
4. Finally, your gift is tax deductible. Gifts to a chapter house corporation or Alumni association do not enjoy similar tax benefits.

Preserve Our Heritage

Goal: \$3 million

Many Alumni are surprised to learn that undergraduate dues cover only 65% of the cost to run the National Fraternity. This financial model, however, is not unusual. Fraternity dues have never reflected the true cost of operating Chi Phi – or any other national fraternity.

The **Chi Phi Fund**, the Fraternity's annual fund, is the vehicle we rely on each year to close the gap between what students pay and what it actually costs to support and educate them. Every Chi Phi initiate benefited from a "silent scholarship" made possible by generous Alumni who give back by contributing regularly to the Chi Phi annual fund. The tradition of giving back continues today and must continue into the future. We still depend on Alumni, parents and friends to contribute to the Chi Phi Fund each year to provide a variety of educational opportunities to students across the country. A robust annual fund is a cornerstone of the *Changing Lives Campaign* – and quite frankly, a necessity until this capital campaign generates and realizes the long-term endowments we need to sustain excellence.

The soon-to-be created **Chi Phi Greek Life Museum** provides a long-awaited opportunity to preserve, protect and present the historic documents, photographs and memorabilia of not only Chi Phi but the local organizations that are now part of the Chi Phi family. The Museum will also demonstrate how our Fraternity relates to the larger fraternal movement in America.

Finally, increasing unrestricted support provides the tools Chi Phi needs to adapt and evolve to meet the needs of the future. Unrestricted gifts provide flexibility for future Trustees of the Chi Phi Educational Trust to react and respond where the need is greatest. **Unrestricted Quality Enhancement Funds** provide opportunities for donors to establish named funds to perpetuate their legacy or the legacy of a loved one without restricting the hands of fraternity leaders generations from now.

To inspire and recognize the generosity of donors, Chi Phi has established the following giving and recognition opportunities. Donors can name a program in perpetuity by creating a permanent endowment, or donors can name a program from one year to the next by providing annual support.

ACADEMICS	PERMANENT ENDOWMENT	ANNUAL EXPENDABLE SUPPORT
(Your Name) National Scholarship Program	\$1 million	\$50,000
(Your Name) Staff Fellowship	\$100,000	\$5,000
(Your Name) Graduate Scholarship	\$50,000	\$2,500
(Your Name) Undergraduate Scholarship	\$25,000	\$1,250
LEADERSHIP		
(Your Name) Total Membership Education	\$2 million	\$100,000
New Member Manual Sponsor	\$400,000	\$20,000
Program Components - starting at	\$60,000	\$3,000
(Your Name) College of Excellence	\$2 million	\$100,000
Sessions and Programs - starting at	\$100,000	\$5,000
Student Sponsor	\$25,000	\$1,250
(Your Name) Alpha Academy	\$1 million	\$50,000
Sessions and Programs - starting at	\$100,000	\$5,000
Chapter Sponsor - per Chapter Alpha	\$40,000	\$2,000
(Your Name) Regional Leadership Alliance (five available)	\$200,000	\$10,000
Sessions and Programs - starting at	\$25,000	\$1,250
Student Sponsor - per student	\$20,000	\$1,000
CHAPTER EXCELLENCE		
(Your Name) Chapter Scholarship	\$25,000	\$1,250
(Your Name) Alpha Academy Sponsorship	\$40,000	\$2,000
(Your Name) College of Excellence Sponsorship	\$25,000	\$1,250
(Your Name) Regional Leadership Alliance Sponsorship	\$20,000	\$1,000
(Your Name) Chapter Visit & Training Session	\$200,000	\$10,000
HERITAGE		
(Your Name) Chi Phi Greek Life Museum	\$2 million	\$100,000
Individual Displays - starting at	\$50,000	\$2,500
(Your Name) Quality Enhancement Fund - starting at	\$10,000	n/a
(Your Name) Space at the William M. Byrd Chi Phi National Headquarters Building - starting at	\$100,000	\$5,000
Chakett Magazine Sponsor - per issue	\$800,000	\$40,000

Standards of Giving

CAMPAIGN LEGENDS \$1 Million & Above

CAMPAIGN CHAMPIONS \$500,000 - \$999,999

CAMPAIGN INVESTORS \$250,000 - \$499,999

CAMPAIGN GUARDIANS \$100,000 - \$249,999

CAMPAIGN DEFENDERS \$50,000 - \$99,999

CAMPAIGN BENEFACTORS \$25,000 - \$49,999

CAMPAIGN SPONSORS \$10,000 - \$24,999

CAMPAIGN ADVOCATES \$6,000 - \$9,999

CAMPAIGN ASSOCIATES \$3,000 - \$5,999

CAMPAIGN PATRONS \$1,500 - \$2,999

CAMPAIGN SUPPORTERS \$500 - \$1,499

CAMPAIGN BACKERS Below \$500

HOW YOU CAN HELP

Those who have been privileged to enjoy the Chi Phi experience now have the opportunity to endow future generations. To achieve the goals outlined, we must raise at least \$10 million.

Since our founding in 1824, the Fraternity has never conducted an effort this bold. Our ambitious campaign will succeed, but only with your enthusiastic participation. You can ensure that many more young men receive the same start in life that you found in Chi Phi. Your contribution to the *Changing Lives Campaign* will make all the difference. Your commitment to donate as generously as your circumstances permit will change the lives of generations of young men and reshape an institution that has meant so much to so many.

GIFTS TO THE CAMPAIGN

Actives, Alumni, parents, friends and corporate partners can make gifts to the Campaign by a variety of outright, pledged and planned giving methods. Pledges may be paid over one to five years. Gifts should be made payable to the "Chi Phi Educational Trust" and mailed to the Chi Phi campaign office.

Contributions to the Chi Phi Educational Trust (tax id: 58-6035103) are tax deductible to the extent permitted by law.

Make checks payable to: Chi Phi Educational Trust

Mail to: Chi Phi Campaign Office
P.O. Box 2187
Columbus, GA 31902
800.849.1824
knott@chiphi.org

A Powerful Partnership



National Campaign Co-Chairman
Christopher J. Shuler,
Alpha Zeta 1984



National Campaign Co-Chairman
James P. Soderquist, D.D.S.,
Alpha 1967



Vice Chairman - Gladfelter Circle
Carl Gladfelter,
Alpha-Tau 1933, Zeta Delta 1956, Iota Delta 1958,
Psi Delta 1970, Eta Delta 1975

Vice Chairman - Gladfelter Circle
Thomas R. Gladfelter,
Alpha Zeta 1975



Vice Chairman - Leadership Programs
Ron P. Frank,
Nu Delta 1983, Iota Zeta 1989, Delta Zeta 2000



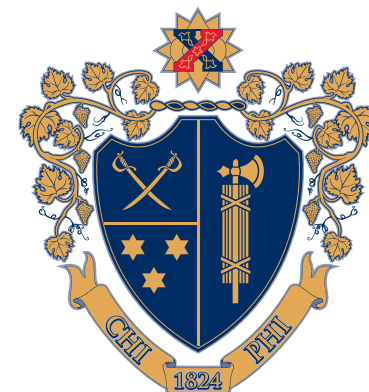
Vice Chairman - MacLean Legacy Society
Andrew Schultz,
Alpha Delta 1960



Vice Chairman - MacLean Legacy Society
Richard S. Gilbert,
Rho 1962



Vice Chairman - Men of 1824
Patrick Moriarty,
Tau Zeta 2013



DIRECTORS OF DEVELOPMENT

Elizabeth Knott
knott@chiphi.org

Fred Maglione, CFRE, JD
maglione@chiphi.org



Chi Phi Fraternity and the Chi Phi Educational Trust
1160 Satellite Boulevard NW
Suwanee, GA 30024

800.849.1824
www.chiphi.org
www.chiphicampaign.com

www.facebook.com/chiphitrust
www.facebook.com/ChiPhiFraternity
www.youtube.com/chiphitrust

CAMPAIGN SUPPORT AND
ASSISTANCE PROVIDED BY:



OmegaFi
800.276.6342
omegafi.com
facebook.com/omegafi