

Report of the Committee on Development for the Year Ending June 30, 2009

The Sigma Xi's Development Committee was reorganized after a hiatus of two years in fall 2008. The committee was led by Board of Directors member Dr. David C. Lever '96 and was composed of:

Dr. James F. Baur '62
Dr. Steve Pueppke '73
Dr. Marian Johnson-Thompson '71
Dr. Jack H. Britt '70
Dr. Larry James '08
Dr. Robert K. McMahan, Jr. '97
Dr. Ann Williams '75
Dr. Howard Ceri '82
Dr. Jerry Baker '90

During 2008-2009 the Development Committee and Sigma Xi Board of Directors took the following actions:

- Adopted a Donor Bill of Rights to assure the highest standards in charitable solicitation, transparency, and management.
- Established the Society's first Gift Acceptance Policy to ensure compliance with governmental regulation. In addition, Sigma Xi's policy reflects a strict adherence to resource development best practices outlined by the National Committee on Planned Giving's Models of Practice of the Charitable Gift Planner and the Association of Fundraising Professional's Code of Ethical Principles and Standards.
- Launched the Sigma Xi Wealth Preservation & Philanthropic Planning resource center (<http://sigmaxi.giftlegacy.com>) and a monthly eNewsletter by the same name for members to provide financial and estate planning support. The Wealth Preservation & Philanthropic Planning resource center has received more than 87,000 visits since its launch in November 2008 including thousands of repeat visitors.
- The Committee recommended and the Board approved the creation of The LeRoy Record Society in memory of Mr. LeRoy Record '51, the donor of Sigma Xi's largest planned gift to date, as our highest donor recognition group and to encourage "planned giving".
- Based on development best practices, the Committee and Board authorized the expansion of Sigma Xi's "gift recognition" categories and benefits to include:
 - The 834 Club—\$100-499
 - The Companion's Club—\$500-999
 - The 1886 Circle—\$1000-4999
 - The Laurels Circle—\$5000-9999
 - The LeRoy Record Society—\$10,000 or a planned gift
- During the worst economic downturn in four decades, The Sigma Xi Fund, our annual appeal, received \$313,668, down by 15% from the previous year. While overall giving was down, approximately fifty percent of the FY09 donors had not given in FY08.

The Committee also reviewed the capital campaign feasibility study prepared by Ross, Johnston & Kersting (issues May 28, 2008), and the consensus for the staff and members was that a capital campaign was ill advised at this time. The committee did approve an alternative course of action that would prepare the Society for a possible campaign in 2011 or thereafter, including:

- An assessment of member's giving priorities and how they should influence the program of the Society,
- An ongoing analysis of member's giving potential with identification of members with the greatest interest in supporting the Society,
- The recruitment and training of a cadre of members to serve as donor ambassadors to build stronger relationships with members,
- Strengthening the Society's capacity to promote, solicit, and support members in implementing planned gifts.

In addition, the Development Committee authorized a staff review of major estate gifts received over the past decade and that review confirmed that Sigma Xi has and continues to operate in compliance with fundraising standards and legal regulations in complying with donor's wishes. It was the recommendation of the Development Committee that planning for the 125th anniversary of Sigma Xi's founding in 2011 begin as soon as possible recognizing that the Quasquicentennial offered the Society an immense opportunity to grow both in public recognition but also expand our philanthropic base.