



DELTA SIGMA PHI
FOUNDATION
2003-2004 ANNUAL REPORT



Dear Brothers,

As you glance over the pages of this Annual Report, you'll observe a sea of names belonging to our brothers, most of whom you've probably never met. These are brothers who are committed to the current and future success of Delta Sigma Phi and its members. We are honored to be in your company, and we are grateful for your support of the Foundation and the many thousands of brothers your gifts will reach.



As a result of your support our undergraduates are receiving first-rate leadership training and personal development programs like the Leadership Institute and the Regional Leadership Academies. This year \$125,000 was granted to the National Fraternity to support these initiatives that provide life-changing learning experiences for our undergraduate members. Look for testimonials throughout this report that illustrate the significance of these programs in the lives of our brothers.

Our *Pyramid Perpetuation* giving program was established in late 2003 to better address the growing educational needs of individual chapters. *Pyramid Perpetuation* allows you to allocate 25% of your Foundation gift to your chapter's *21st Century Fund*, a restricted chapter account within the Foundation. The total dollar amount donated to our undergraduate chapters, as a result of this program, has grown by 25% in the past year. Distributions from *21st Century Funds* resulted in more than \$45,000 granted directly to chapters for educational purposes, such as scholarships.

In its third year of existence the 1899 Society, made up of donors who commit to giving \$1000+ annually for at least 5 years, grew to 163 members by the end of June 2004. This commitment from our top financial supporters enables us to project the growth of our leadership education programs more strategically.

Our endowment fund recently grew beyond the \$750,000 mark as a result of a \$70,000 bequest from Dr. Edward W. Clements, *San Jose State '48*. Ed served on the Grand Council in the 1960's, which at that time was known as the Board of Governors. You'll find an article highlighting Ed, his life and his membership, on page 21.

This was a year of growth for new programs as well. Our first major online gift appeal was sent this past spring netting 150 new donors for the Foundation. To our newest donors, we welcome you and look forward to partnering with you.

As we look to the coming year, the size of the Foundation Board of Trustees will increase to 50 members (from 10) by 2006. This move will enhance the fundraising capacity of the Board. Initial recruitment efforts have already resulted in an increase to 18 trustees.

Acknowledging that the success of our undergraduate members contributes to the overall strength of the organization, we have preliminary plans in place to begin another major campaign. Funds raised will improve support for leadership training, scholarships and educational aspects of chapter housing. We have also established a long-term goal to increase the Foundation's assets to \$25 million (from \$3 million) within 15-20 years through various means, including an expanded planned giving program.

As we continue to grow in our ability to support excellent programs for our undergraduates we are encouraged by the promising future of Delta Sigma Phi. Your support provides the resources needed to better equip our undergraduates and ensure the future of the organization. The pages that follow share highlights from the past year and encouragement that your generosity makes the work we all do together possible.

YITBOS,

A handwritten signature in cursive that reads "Tom Roeser".

Tom Roeser, *Purdue '70*
Foundation President

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continued on next page

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DR. ED W. CLEMENTS BEQUEST

Dr. Edward Woodrow Clements, *San Jose State '48*, left a generous bequest of \$70,000 to the Delta Sigma Phi Foundation.

Ed served on Delta Sigma Phi's Board of Governors (known today as Grand Council) in the 1960s. He received his undergraduate degree from UCLA and earned his Masters and Doctorate degrees in Philosophy from Stanford University. Ed taught at Stanford University and held Professor Emeritus status at San Jose State University where he was a long-time chapter advisor for the Gamma Epsilon chapter.

Ed also served our country in the US Navy during WWII and retired as a Captain. He was active in his community as a 32 degree Mason and a dedicated member of the Rotary Club of Palo Alto.

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P Lattner 15

Bobby Sefton 28

Douglas Warford 12

SUSTAINING BROTHERS

Edward Le Fevre 30

Gary Workman 25

ALPHA MU

Virginia

CARNATION

Gregory Stayin 7

PHAROAH

Dennis Howard 26

Michael Steger 9

SPHINX

Patrick Allman 16

Jeffrey Barb 7

Richard Brandt 25

Roger Carroll 20

Henry Curry 16

Thomas Loew 10

Cameron MacLeod 9

Robert Martin 25

Steven Okun 9

Lester Wagner 25

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William Anderson 15

Jon Dubrow 8

Michael Gavornik 2

Todd Wielar 3

Jonathan Woodall 9

NILE CLUB

David Ruggles 4

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Oglethorpe

CARNATION

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Jon Gundlach 11

Lance Leitzel 9

William Porter 4

PHAROAH

Timothy Roberson 5

TESTIMONIAL



“The leadership skills I developed through my participation in the fraternity’s leadership programs were matched only by the opportunities offered to use those skills. As is typical with leadership programs, I cultivated skills of time management, effective communication, and conflict resolution. However, Delta Sigma Phi leadership programs also instill unique values - respect, diplomacy, and openness – all pillars on which to become a successful leader. These values have greatly contributed to where I am today and what I have achieved.”

Brad Sullivan, Transylvania '99
attended Leadership Institute & Regional Leadership Academy as an undergraduate

Kalvin Kampfer	11	David Hilderley	13
John Kubalak	9	Jackson Huang	1
Herbert Miller	13	Charles Huber	18
Ronald Woofter	34	Richard Pompian	22
		Robert Stoltenberg	10
		Don Taylor	9
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Michigan-Ann Arbor		William Chase	16
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Milton Heath	35	Walter Gerdes	13
Kenneth Moore	24	Thomas Hunter	12
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Charles Walgreen	32		

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Ben Matthews	1
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Ryan Peede	7
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Mark Boyt	1
Christopher Brown	1
Galen Brownley	1
Patrick Fossett	1
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Christopher Koda-Massey	1

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PHAROAH	
James Peironnet	3
SPHINX	
Robert Davis	28
Ralph Gutierrez	8
Joseph McClary	26
Sigfred Sandberg	44
PYRAMID	
Robert Damiano	13
NILE CLUB	
Joaquin DeVargas	13
Bryon Large	1
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PYRAMID	
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Richard McLellan	27
Marc Ruzicka	2
Jeffrey Stinedurf	4
Eugene Sullivan	6
Kevin Tishkowski	6
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Robert Chapman	32
Daniel Kun	2
Tom Lipps	2
Forrest Owen	21
Lawrence Vogt	8
PHAROAH	
William Brady	34

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Roger Miles	5
Steven Petzer	2
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Ralph Shersmith	14
Fred Somes	18
Seth Spittler	25
Mitchell Swayze	10
Andrew Ten Eyck	11
PYRAMID	
Norman Blemaster	18
Lester Chan	19
M D'Ooge	39
Robert Henry	28
Jack Kennedy	15
Thomas Kusek	9
Robert Luscombe	15
Dennis Niemiec	27
Larry Stringer	14
Clarence Willis	16
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Warren Brown	10
Brian Cartwright	3
George Dovas	16
Edmund Ferguson	12
Arthur Feters	26
John Hogle	17
Kenneth McCullough	11
Alex Petersmarck	1
Michael Smelt	22
John Updegraff	14
Gerald Wing	7

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PHAROAH	
James Wilson	15
PYRAMID	
Anthony Doing	3
NILE CLUB	
George Bailey	13
Frank Haynes	29

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PHAROAH	
Wilmer Webster	18
Timothy Wilbur	4
SPHINX	
DeCorsey Bolden	7
Henry Grathwol	28
PYRAMID	
John Browning	19
Frank Caldwell	20
Marlin Glatfelter	25

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Robert Churchill	38
Jeffrey DeGroat	1
Joseph Panella	24
John Walters	21

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Order of the Scarabaeus	\$500-\$999
Order of the Pharoah	\$250-\$499
Sphinx Club	\$100-\$249
Pyramid Club	\$50-\$99
Nile Club	\$25-\$49
Sustaining Brothers	under \$25

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Michael Lackett	11
Albert Nardone	19
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Warren Wagner	33

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Loren Tregellas	40
Patrick Wilkerson	25
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Howard Benton	29
Paul Burch	21
Robert Cook	6
Peter Dahlquist	31
Alex Dean	4
Fred Dellett	31
Jason Frakes	2
James Gieber	10
William Hale	18
Kenneth Hartung	16
Donald Jennison	16
William Kush	12
David Mertz	4
John Mowry	8
David Ott	10
Stephen Pepon	14
Bill Pierce	16
Brian Scarlett	5
Robert Young	5
PYRAMID	
Henry Boss	24
Richard Davis	7
Timothy Gogolski	13

List of Donors from July 1, 2003 through June 30, 2004

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Alan Baker	13
James Barr	25
Robert Boyle	7
Michael Emo	1
Robert Hann	23
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Stetson	
CARNATION	
John Edwards	11
Joseph Hess	2
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Jason Welch	3
PHAROAH	
Richard Paul-Hus	1

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Peter Lawson	9
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Robert Allington	13
Edmund Bruce	5
Robert Glantz	21
PYRAMID	
John Flemming	12
William Marsh	12
Brian McHugh	17
NILE CLUB	
Robert Johnson	13
Robert Konen	13

Brian Brooks	28
Donald Heppermann	13
Harold Jost	9
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Steven Richardson	3
Stephen Smith	11
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Frederick Rible	16

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Jon Lee	9
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Edwin Stewart	27
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John Brough	6
Richard Duroe	42
Robins Jackson	30
Brian Ladd	4
Dan Muller	13
Richard Roe	37
Howard Rohm	18
Douglas Ziegler	3
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Robert Coacher	5
Eugene Gildermaster	10
Mark Ludley	11
William O'Toole	11
William Tiedje	16
NILE CLUB	
William Buchanan	20
John Guyer	6
Kenneth Klindt	24
J Scigliano	24

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William Lang	13
Gabriel Lansberry	5
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Kirk Peterman	14
Richard Powelson	4
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Mark Turner	2
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PEARL	
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TOP CHAPTERS BY TOTAL DOLLARS GIVEN

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Illinois	41,391
Texas-Austin	33,521
Purdue	23,820
Missouri-Columbia	23,022
Michigan State	22,700
UC-Berkeley	20,481
UC-Los Angeles	19,664
San Diego State	16,671
North Carolina State	11,404

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Thomas Applegate	37
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PHAROAH

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SPHINX

Ted Matney	6
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Lonnie Williams	23
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Jan Kaley	5
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Transylvania

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Todd Swanson 5

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Ronald Basmajian 10

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SPHINX

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Robert Lagomarsino 27

PYRAMID

Van Botts 27

TESTIMONIAL



“Delta Sigma Phi’s leadership programs helped me develop better leadership skills, professionalism, communication, time management and dedication, which are all tools that I use every day in my career. Delta Sigma Phi helped me challenge myself to accomplish things I never thought possible. I am forever grateful for that experience.”

John “Frate” Iafrate, UNC-Charlotte ‘98
attended Leadership Institute & Regional Leadership Academy as an undergraduate

Robert Thompson 20

H. Witherspoon 23

PYRAMID

Thomas Barb 6

Walter Clark 23

David Davis 4

Uko Villemi 35

NILE CLUB

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PHAROAH

Robert Hrebek 6

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 Gordon Mills 17
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 Christopher Lawson 1
 Gregg Rebenstorf 16
 Edward Urban 1
 Raymond Williams 11

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 Ernest Pagliaro 4
 Samuel Pantano 16

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 Louis Colussi 21
 David Dinich 9
 Hiram Driscoll 7
 Herbert Smith 13

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 Michael Hoffman 17
 Paul Williams 3
PHAROAH
 Don Winterhalter 10
SPHINX
 Jason Baker 1
 Frank Kijak 1
 Charles Misfeldt 12
 Lewis Neeb 14

SUSTAINING BROTHERS
 Charles Maggio 21

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 Arizona
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 James Moody 11
SPHINX
 Stephen Dundas 18
 Richard Ebert 18
NILE CLUB
 Thomas Maxwell 1

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 Mark Johnson 13
 Jim Kalb 9
 Harry Newlon 27
 David Recht 22
 George Reynolds 26

List of Donors from July 1, 2003 through June 30, 2004

Foundation Announces New Charitable Estate Planning Website

The Delta Sigma Phi Foundation has launched a new planned giving section of the Delta Sig website that will help keep our supporters up-to-date on current issues related to estate planning, particularly ways to maximize your estate while supporting the charitable institutions that have influenced your life. This comprehensive resource can help answer many of your gift planning questions. Included on the site are information about different giving strategies, a gift-calculator, and numerous e-brochures and articles that are continuously updated to reflect tax law changes. We also provide a glossary of planned giving terms to clarify any unfamiliar terms.

You can use the site to:

- Discover the tax and income benefits of various types of planned gifts
- Read in-depth about trusts and annuities that pay you an income for life
- Get tips on how you can make gifts from life insurance policies, retirement plan assets or appreciated property
- Learn how to set up your will so that the government does not benefit more than your heirs
- Discover a virtual encyclopedia of information on how and what to give
- Access hundreds of up-to-date articles on making the most of your charitable giving
- Calculate your income tax deduction for charitable gifts

To access the planned giving section of our website, go to:

<http://www.deltasig.org/foundation/ways.html>

and click on "Planned Giving" in the left-hand navigation menu. For more information about including Delta Sigma Phi in your estate planning, please contact Tony Smercina at 830-822-0930.

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RUSSELL ROEBUCK SCHOLARSHIPS

Russell Roebuck was a long-time national volunteer and former National President of Delta Sigma Phi. Russell was initiated in 1958 at the Delta Iota Chapter at Barton College. As a result of a very generous estate gift from Russell, a scholarship endowment was established to benefit members of chapters and colonies in the state of North Carolina. Since 2000, Russell Roebuck Scholarships have been awarded to deserving members each summer for the following academic year.



Since its inception over \$20,000 has been awarded because of Brother Roebuck's generosity, and this past year over \$5200 was distributed to seven undergraduate members attending North Carolina universities. For more information or to apply for a Russell Roebuck Scholarship, please contact Randy Peterson at Peterson@deltasigma.org.

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TESTIMONIAL



“Above all, the Delta Sigma Phi Leadership Institute still proves invaluable in my day to day work. From the confidence in my own abilities to the techniques needed for success, my experience at the Leadership Institute has played a major role my professional career.”

Dany Berghoff, Columbia, '99
attended Leadership Institute, Regional Leadership Academy, & Convention as an undergraduate

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by Gerald Spolter
 in memory of Kevin Costelloby Elizabeth Elwood
 in memory of Guilford D. Cummings, Jr.by Dede Andersen
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Chapter	Average Gift
UC-Berkeley	\$706.24
Illinois	689.85
Missouri-Columbia	469.84
Iowa State	440.60
Michigan State	420.37
Texas-Austin	399.06
San Diego State	396.93
Purdue	384.19
North Carolina State	367.87
UNC-Charlotte	343.13

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Jon Krause 10

Ronald Scholtz 10

Martin Self 6

PHAROAH

James Evans 29

Jonathan Shull 11

SPHINX

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Al Campbell 20

BOB ROJKA SCHOLARSHIPS

Robert F. Rojka, *San Jose State '49*, left a generous bequest to the Delta Sigma Phi Foundation that will provide scholarships to brothers from California chapters during the 2004-2005 academic year. Should Delta Sigma Phi ever reopen the chapter at San Jose State, these scholarship funds would then be reserved for Delta Sigma Phi undergraduates from that chapter.

For more information or to apply for a Bob Rojka Scholarship please contact Jim Knoll at JLKNOLL@aol.com.

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“The valuable lessons I learned from attending Delta Sigma Phi’s LI and NIC’s Undergraduate Interfraternity Institute have given me a unique perspective on situational leadership early in my career and have enabled me to successfully market myself not only as a skilled professional but also as a versatile leader. I am grateful to have had the privilege to attend these sessions and encourage all of our undergraduate brothers to do so.”

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Kansas State	.48
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Western Illinois	.35
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