

Pi Beta Phi Foundation 2020-2021 Annual Report

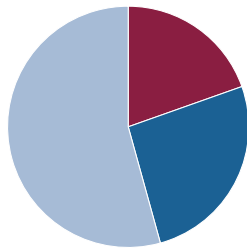
While the turbulence of the past fiscal year brought significant changes in giving to our Foundation, we invested \$772,103 in Fraternity programs and grants because of your generosity. With every gift, you demonstrated how steadfastly you believe in Pi Beta Phi and in every member who shares our sisterhood.

Our annual revenues and expenses differed from previous fiscal years due to impacts of the COVID-19 pandemic. Under the leadership of Foundation staff and the Foundation Board of Trustees, resources were prioritized to maintain existing programs to support Pi Phi and our communities. The largest expense reduction was managed through not filling staff vacancies and by incurring no travel or catering expenses by suspending in-person events and travel with COVID-19 considerations.

The variance in our financial landscape demonstrates exactly why support to our Foundation — especially gifts to the Friendship Fund — is so critical. Unrestricted gifts ensure our Foundation can support Pi Phi's areas of greatest need, from funding member programs to providing the resources needed to sustain our sisterhood in any circumstance. In a year unlike any other, your generosity and commitment helped us continue to fulfill the promise we make to every Pi Phi sister. ←

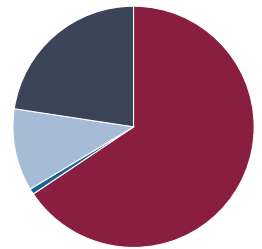
Assets Under Management

Undesignated	\$6,235,528
Board Designated	\$8,317,198
Donor Designated	\$17,290,379
Total	\$31,843,105



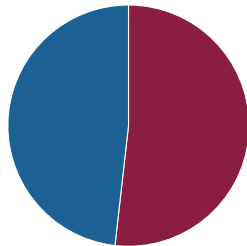
Total Annual Expenses

Salaries and Benefits	\$816,412
Events and Workshops	\$9,499
Printing	\$137,248
Travel	\$0
All Other Expenses	\$281,273
Total	\$1,244,432



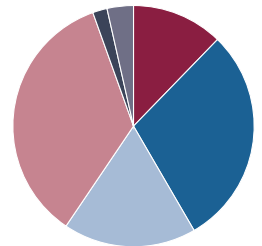
Annual Revenues

Without Donor Restrictions	\$1,766,629
With Donor Restrictions	\$1,644,381
Total	\$3,411,010



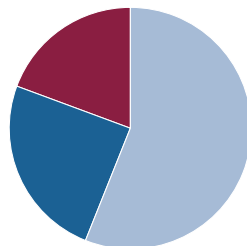
Program Service/Grant Expenses

Leadership*	\$94,618
Literacy	\$226,771
Housing	\$137,691
Scholarships**	\$270,750
Heritage	\$15,000
EHT Fund	\$27,273
Total	\$772,103



Total Expense & Grants by Program

General & Administration	\$390,034
Fundraising	\$496,417
Program	\$1,130,084
Total	\$2,016,535



*includes \$12,011 in Chapter Leadership Education Endowment Fund grants to chapters.

**the expense amount differs slightly from the amount awarded due to forfeited scholarships unable to be re-awarded.

Because of *your support*,
our Foundation invested

\$772,103

in leadership, literacy, housing, scholarships,
heritage and emergency grants.

4,232

donors supported
Pi Beta Phi through gifts
to our Foundation.

492

donors made gifts at the
Evelyn Peters Kyle Society
leadership giving level.

\$272,900

awarded in
scholarships
to Pi Phi
collegians
and alumnae.

19,750

collegians were
empowered
through leadership
development
opportunities.

46,000

books distributed through FDS500.

742

donors made
gifts on Pi Phi
Giving Day.

9,272

Halos were sent
through Halo
Heaven to honor
special Pi Phis.

602

Wine Carnations
were given in
celebration of
Pi Phi sisters.

Visit pibetaphi.org/foundation to see the sisters and
friends who generously supported our Foundation.

A Beloved Sister's Support

A cherished, committed member of our sisterhood, **ADRIENNE HISCOX MITCHELL**, Kansas Alpha and past Grand Council member and Foundation Board of Trustees President, left a bequest to Pi Beta Phi Foundation which we received after her passing during this fiscal year. A loyal Pi Phi and Foundation donor, Adrienne left a detailed designation in her estate that her gift benefit a designated endowed scholarship as well as the Friendship Fund. Adrienne knew from her lifelong giving to the Friendship Fund how critical unrestricted dollars are for our Foundation.

When an unrestricted bequest is received, Pi Beta Phi Foundation Trustees have the responsibility to consider the best use of the funds. A gift of this kind may be used for operational needs, held in operational reserves or invested in our operational endowment. Adrienne's unrestricted bequest allowed our Foundation to fulfill ongoing programmatic needs which would have otherwise been dramatically impacted due to the decline in overall giving from individuals, as well as chapters and alumnae club fundraising. We believe Adrienne would have been so pleased to offer such critical support to our sisters and sisterhood during this unexpected year and we're immensely grateful for the support offered by a steadfast supporter of our sisterhood.

If you're interested in including Pi Beta Phi Foundation in your estate plans, visit pibetaphi.org/foundation/planned-gifts.



From left, Illinois Alpha **EVELYN PETERS KYLE** and Kansas Alpha **ADRIENNE HISCOX MITCHELL**.

Every Gift, Every Sister, Every Year

Thanks to the loyal support of donors like you, Pi Beta Phi Foundation was able to help our Fraternity continue to build Friends and Leaders for Life during a time of unprecedented challenges. Through gifts to donor-designated funds and the Friendship Fund, you helped our Foundation support Pi Phis and their communities through the programs below. Gifts to the Friendship Fund — the single most impactful way our Foundation fulfills the promise we make to every sister — support each of these programmatic areas, cover operational expenses and help Pi Phi meet additional needs not covered by designated funds alone.

LEADERSHIP

Grants from donor support to our Foundation funded essential leadership development programming for alumnae and collegians. While it was not possible to hold in-person events such as College Weekend, Pi Phi provided virtual training for all chapter officers and Advisors, as well as additional courses through the Fraternity's Online Learning Center. Virtual experiences like the Resiliency Webinar Series with Erin Fischer and a keynote address from Lindsay Boccardo helped Pi Phi leaders gain confidence and insight as they navigated the challenges of an uncertain year. Foundation support for the Leadership Development Consultant (LDC) program continued to provide encouragement and stability for chapter leaders when it was needed most.

Chapter President **CAROLINE AYERS**, Tennessee Gamma, said the leadership development training she continues to receive from Pi Phi is invaluable. "When I walked into College Weekend 2020, I had an overwhelming feeling of support from Pi Phis of all ages, most of whom I had never even met," Caroline shared. "It's hard to describe how powerful it is to have so many strong women come together to learn how to be better leaders and how to serve our communities well. Even through the pandemic, Pi Phi made a point to stay true to our value of

CAROLINE AYERS, second from left, with the Tennessee Gamma Executive Council at College Weekend in January 2020.

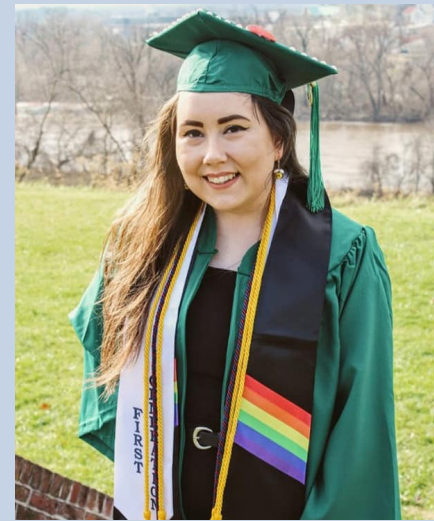


Personal and Intellectual Growth through virtual webinars. I learned how to be resilient in tough times, which has helped me not only as a chapter leader but as a friend, sister, daughter and student. I knew I would grow in college, but I had no idea the potential Pi Phi would cultivate in me to help me accomplish things I didn't even know I wanted."

SCHOLARSHIPS

The generosity of donors helped our Foundation award \$272,900 in need-based undergraduate scholarships, graduate fellowships and Alumnae Continuing Education (ACE) scholarships for the 2020-2021 academic year. The awards helped to support and encourage 116 Pi Phi collegians and alumnae as they pursued their academic goals, making an immeasurable difference in the lives of our members.

Virginia Iota **ABBY BUTLER-CEFALO** conveyed how meaningful her award was in a thank-you message to donors. She explained that being chosen to receive a Friendship Fund Scholarship from our Foundation would help her make a difference in our world. "As a first-generation college student, education is my main priority, and I want nothing more than to make my family proud," Abby said. "By receiving this scholarship, I'm able to continue my studies and will graduate soon with a degree in social justice and human rights ... Thanks to you, I'm able to give back and help transform lives through our sisterhood."



Virginia Iota **ABBY BUTLER-CEFALO**

Funding from the current fiscal year is supporting an additional 101 Pi Phis with scholarship awards for the 2021-2022 academic year, totaling \$248,800 in tuition assistance. See the full list of this year's recipients at pibetaphi.org/scholarship-recipients.

LITERACY

Grants from our Foundation fully funded all Read > Lead > Achieve® programming and Pi Phi's ongoing partnership with First Book®. The Fraternity brought more than 46,000 books to children in need through the Fall 2020 FDS500 grant program. When 2021 Fraternity Day of Service Signature Events could not take place as planned, Foundation funding supported a special

spring literacy initiative that connected educators with First Book resources and gift certificates to First Book Marketplace.

Jamie Lanagan, a Title I educator who teaches middle school students with special needs in Brooklyn, New York, is among the more than 190 teachers and organizations who benefited from the initiative. “We don’t have a school-wide library, so any books my students have access to come mainly from what I’m able to provide,” Jamie shared. “Having a gift certificate to First Book Marketplace has completely changed our classroom library in terms of the number of books and the content.”

Pi Phi also strengthened the future of their communities by supporting literacy programs close to home. Thanks to the fundraising efforts and nominations of our chapters and alumnae clubs, our Foundation awarded \$25,771.38 in Local Impact Grants to 33 organizations across North America. Additional donations to the Arrow in the Arctic Fund benefited library systems in Canada’s North, with a focus on communities in the Yukon, Northwest Territories and Nunavut.

EMMA HARPER TURNER FUND GRANTS

Emergency grants from the Emma Harper Turner Fund continued to be a lifeline for alumnae and collegians in sudden financial crisis. Grants supported 17 Pi Phi facing unexpected hardships such as natural disasters, serious illnesses, loss of immediate family members, job elimination and emergencies related to the ongoing pandemic.

For members like Ohio Alpha **MELISSA KILBANE**, who received an Emma Harper Turner Fund grant during the previous fiscal year, the support exemplifies the strength of Pi Phi sisterhood and values in action. “With family members and myself being out of work [due to COVID-19], I was worried about how I was going to continue studying at Ohio University,” Melissa said. “I’m extremely grateful for every single donor who is helping me and showing our core values along the way. Without these donors, I would not be able to continue my education and time with my sisters, so for them I am forever thankful.”

HOUSING

In support of the Pi Phi housing experience, our Foundation partners with individual chapters raising funds for major facility renovation projects. These chapters are eligible to receive Foundation grants from designated chapter-specific funds to cover qualified educational expenses and improvements associated with the projects, such as technology upgrades and study room expansions. This fiscal year, our Foundation made housing grants to the Arizona Alpha, Indiana Delta and

Oklahoma Beta Chapters. When past housing grant recipient Georgia Alpha outgrew its home, the chapter worked with our Foundation to raise funds for much-needed renovations to gathering, dining and study spaces. “Time spent with our sisters is so valuable,” said campaign co-chairs **PEGGY BATSON BALLARD** and **JOAN TODD DUNCAN**, both Georgia Alpha. “For our chapter to continue to develop Sincere Friendships that last a lifetime, we needed to create spaces where our members can be together. Our partnership with the Foundation and the staff working hand in hand with our campaign members made this project happen.”

HERITAGE

Holt House is a special place for all Pi Phi to celebrate our shared history and honor the beginnings of the Fraternity. Foundation funding supported the expenses for ongoing maintenance, upkeep and daily operations associated with the preservation of this historic home.



From left, Illinois Beta-Deltas **SAM NICHOLS** and **LIVY JANEY**

Fraternity Historian and Archivist **FRAN DESIMONE BECQUE**, New York Alpha, believes a visit to Holt House is a must for every Pi Phi — an experience made possible through donor support. “Holt House is not only a connection to our past, but also to our future,” Fran shared. “When one walks through the door and heads up the staircase, the magic begins. Imagine those young women as they came to the house that April evening. They held onto the bannister as they climbed to the second-floor room shared by **ADA BRUEN GRIER** and **LIBBIE BROOK GADDIS**. How awe-inspiring it is that we’re still able to hold the same bannister and stand in that bedroom today.” ←