

PI BETA PHI FOUNDATION GUIDE

A comprehensive resource designed to equip Pi Beta Phi leaders with all they need to know about Pi Beta Phi Foundation.



1154 Town and Country Commons Drive, Town and Country, MO 63017 • www.pibetaphi.org

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PI BETA PHI FOUNDATION OVERVIEW

The mission of Pi Beta Phi Foundation is to enable the Fraternity to realize its mission and ensure the future of the sisterhood.

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

Incorporated in Missouri in 1990 as a public charity under the Internal Revenue Code 501(c)(3), Pi Beta Phi Foundation is a vehicle whereby Pi Beta Phi members and friends can make tax-deductible donations to fund qualifying programs for Pi Beta Phi Fraternity and its members. Pi Beta Phi Foundation ensures a financially sound future for the Fraternity through scholarship opportunities, educational programming, Fraternity heritage, philanthropic efforts and charitable programs.

For more information about Pi Beta Phi Foundation, contact us by email at fndn@pibetaphi.org or by phone at (636) 256-1357.

WHY GIVE?

Your support provides Pi Phi the resources it needs today, to ensure we're meeting the needs of tomorrow. Pi Phi is committed to promoting friendship, cultivating leadership potential and enriching lives through community service. To fulfill this promise, we need the support of every sister, every year. Every gift makes a difference for our sisterhood.

- **Pi Beta Phi Foundation is uniquely focused on helping Pi Beta Phi fulfill its mission** — promoting friendship, cultivating leadership potential and enriching lives through community service.
- **Your support of Pi Beta Phi through gifts to our Foundation helps bring that mission to life**, making an impact across our sisterhood and in our world.
- When you give to our Foundation, you provide the resources Pi Phi needs today to ensure we're prepared to meet the needs of tomorrow.

WAYS TO GIVE

- **Online:** Make a gift with a credit card at give.pibetaphi.org.
- **By phone:** Make a gift by speaking to a Foundation staff member at (636) 256-1357.
- **By check:** Make your check out to Pi Beta Phi Foundation, with your gift designation in the memo line. Checks can be mailed to: Pi Beta Phi Foundation, PO Box 801867, Kansas City, MO, 64180-1867.

GIFT TYPES

- **Memorial and recognition gifts:** Any gift may be designated as a memorial or recognition donation. To do so online, fill out our online giving form and select a Tribute type from the drop-down menu under “Tribute Information.” If you would like the person you are honoring (or a family member, for a deceased person) to receive notification of your gift, please provide contact information in the “Tribute Contact” section. You may also direct your gift as a memorial or recognition gift when donating by phone or by mail. Additionally, you can “Send a Wine Carnation”—a virtual, personalized message honoring a sister who has touched your life. Visit give.pibetaphi.org/carnation to honor a sister today.
- **Monthly gifts:** When giving online, choose the fund you would like to support, enter your gift amount, then check the box next to “Make my gift a recurring donation monthly.” You can also set up a recurring gift over the phone by calling us at (636) 256-1357. Recurring gifts continue in perpetuity until you request to change or cancel them. To change or cancel a recurring gift, please contact the Foundation at (636) 256-1357 or fndn@pibetaphi.org.
- **Matching gifts:** Through corporate gift matching, your employer can multiply your gift to Pi Beta Phi Foundation, maximizing its impact. Check with your company’s human resources office to see if they offer gift matching. If your employer does offer this program, your human resources department should provide you with a matching gift form to send to Pi Beta Phi Foundation along with your gift. Complete the form and mail it with your donation to: Pi Beta Phi Foundation, PO Box 801867, Kansas City, MO, 64180-1867.
- **Planned gifts:** Planned gifts often give donors the greatest ability to make a significant impact and establish a legacy. If you’ve already honored Pi Phi in your estate plans, please let us know so we can celebrate you as a donor and better plan for our financial future. There are many ways to designate Pi Beta Phi Foundation to receive a portion of your estate, including bequests, beneficiary designation of an IRA or insurance policy, and more. For questions about planned giving, please contact our Foundation at (636) 256-1357 or fndn@pibetaphi.org.

For additional giving opportunities and vehicles, visit pibetaphi.org/giving.



AREAS OF SUPPORT

Pi Beta Phi Foundation focuses its work around several key areas that reflect the Fraternity's mission: to provide lifelong enrichment to our members and to contribute to the betterment of society. These key areas include:

- **Friendship Fund**
 - The Friendship Fund is the primary way the Foundation fulfills its mission and ensures the future of the Pi Beta Phi sisterhood. Everything Pi Beta Phi Foundation does is supported with Friendship Fund gifts, wholly or in part.
- **Leadership**
 - Leadership development is at the core of what Pi Beta Phi does every day in chapters and alumnae clubs across North America. Gifts to leadership funds support members' growth through leadership programming, convention, the Leadership Development Consultant program and so much more.
- **Scholarships**
 - With tuition costs rising, scholarships play a key role in the ability of many Pi Phis to achieve their dreams of completing their formal education. Your gifts can help a sister continue their education or finish their degree.
- **Housing**
 - Housing is an integral part of the Pi Phi experience. It is a once-in-a-lifetime opportunity for members to live, learn and grow together. Pi Beta Phi Foundation has several programs in place to support chapter housing.
- **Heritage**
 - The founding of Pi Beta Phi took place at Holt House in Monmouth, Illinois. Your Foundation maintains a Holt House Fund to provide funds to operate Holt House throughout the year.
- **Literacy**
 - Pi Beta Phi's philanthropy, Read > Lead > Achieve®, draws on a century of service and thousands of volunteers to inspire a lifelong love of reading which unlocks true potential. Pi Beta Phi Foundation fully funds all Pi Phi reading initiatives under Read > Lead > Achieve®.
- **Emma Harper Turner (EHT) Fund**
 - The EHT Program grants financial assistance on a confidential basis to alumnae and collegians in dire financial need and for those affected by presidentially declared disasters.



THE FRIENDSHIP FUND

The Friendship Fund is the primary way the Foundation fulfills its mission and ensures the future of the Pi Beta Phi sisterhood. Although Pi Beta Phi Foundation was officially established in 1990, the spirit of friendship and giving began long before. Supporting Pi Phi through gifts to the Friendship Fund is a tangible way to live the values at the core of our sisterhood. Giving embodies Sincere Friendship in its truest form — sisters supporting sisters. Everything Pi Beta Phi Foundation does is supported with Friendship Fund gifts, wholly or in part.

LEADERSHIP

Leadership development is at the core of what Pi Beta Phi does every day in chapters and alumnae clubs across North America. Pi Beta Phi Foundation is proud to support all Pi Phi leadership programs including Pi Beta Phi Leadership Institute, College Weekend, Convention, Critical Conversations®, *Leading with Values*®, the Leadership Development Consultant program and so much more. Your gifts to support Pi Phi leadership funds prepare our members to lead in collaborative and innovative ways. In 2020, the Diversity and Inclusion Leadership Fund was created to fund future programming and leadership education for our members.

SCHOLARSHIPS

With tuition costs rising, scholarships play a key role in the ability of many Pi Phis to achieve their dreams of completing their formal education. Pi Beta Phi Foundation scholarship awards ease heavy financial burdens while honoring our members' academic and personal achievements. Your Foundation annually awards Undergraduate Scholarships, Graduate Fellowships and Alumnae Continuing Education scholarships. Your gifts can help a sister continue their education or finish their degree.

Each year, scholarship applications are available online beginning November 15. All applications are due by February 15 at 11:59 p.m. PST. Find the application at pibetaphi.org/scholarships.

HOUSING

Housing is an integral part of the Pi Phi experience. It is a once-in-a-lifetime opportunity for members to live, learn and grow together. Pi Beta Phi Foundation has several programs in place to support chapter housing. Options include Chapter House Improvement Program (CHIP) funds, Educational Area Grant Program (EAGP) funds, the Chapter Facilities Endowment and more. Your gifts to support Pi Phi housing help advance a collegiate experience that drives member satisfaction.



HERITAGE

The founding of Pi Beta Phi took place at Holt House in Monmouth, Illinois. Your Foundation maintains a Holt House Fund to provide funds to operate Holt House throughout the year. Your gifts to the Holt House Fund support Pi Phi heritage and preserve the memory of our founders.

LITERACY

Pi Beta Phi Foundation plays a critical role in the success of Read > Lead > Achieve. Gifts to The Literacy Fund or Pi Phi's literacy endowments support all Pi Phi reading initiatives under Read > Lead > Achieve, including Champions Are Readers®, Arrow in the Arctic, Fraternity Day of Service, Pi Phi's First Book® partnership and much more. Your gifts champion literacy initiatives that inspire readers to reach their true potential.

THE EMMA HARPER TURNER FUND

The Emma Harper Turner Fund Program grants financial assistance on a confidential basis to alumnae and collegians in dire financial need and for those affected by presidentially declared disasters. Supporting the Emma Harper Turner Fund Program is a wonderful way to live our core values of Philanthropic Service to Others and Sincere Friendship.

The process for applying for financial assistance through the Emma Harper Turner Fund Program is simple and confidential. Please download the form applicable to your membership and situation at pibetaphi.org/grants. Both collegiate and alumnae members of Pi Beta Phi are eligible for assistance.



READ>LEAD>ACHIEVE®

Read > Lead > Achieve® is Pi Beta Phi's philanthropic effort, which inspires a lifelong love of reading that can unlock true potential, creating a more literate and productive society. Our charge is for every Pi Phi to find a way they can participate, donate or advocate for Read > Lead > Achieve! Currently, all Read > Lead > Achieve initiatives are fully funded by grants from The Literacy Fund at Pi Beta Phi Foundation.

LOCAL IMPACT GRANTS

Through Local Impact Grants, chapters and clubs may nominate 25% of their gifts to The Literacy Fund for a local nonprofit organization with a mission or special program focus on literacy. The 25% will be matched by Pi Beta Phi Foundation, dollar for dollar. To make nominations for Local Impact Grants, chapters will use the FT1 Giving Form and alumnae clubs will use the Alumnae Club Foundation Giving Form. Chapters and alumnae clubs using memberplanet may nominate a Local Impact Grant through the memberplanet platform if raising money for The Literacy Fund.

CHAMPIONS ARE READERS®

Pi Beta Phi's unique program, Champions Are Readers® (CAR), is a reading enrichment program for students in pre-kindergarten through third grade. Since its launch, tens of thousands of students have participated in the CAR program in the United States and Canada.

PI BETA PHI FRATERNITY DAY OF SERVICE

In addition to your ongoing literacy efforts, all collegiate chapters and alumnae clubs should make plans to participate in Fraternity Day of Service on or around March 2. Pi Phis across North America join together to celebrate and promote reading through a Fraternity-wide project. Every chapter and alumnae club is encouraged to attend a Fraternity Day of Service Signature Event or plan an event that promotes reading to children in your community. The FDS500 program is another way chapters and alumnae clubs can make an impact in their communities. Chapters and clubs can nominate recipient groups for grants which can be used to purchase up to 500 new books from First Book® for children in need.

For more information about Fraternity Day of Service, please see the Read > Lead > Achieve Guide on the [Resource Library](#).

ARROW IN THE ARCTIC

Arrow in the Arctic supports reading in Canada's Northern library systems: the Yukon, Northwest Territories and Nunavut. Donations to support this Pi Beta Phi philanthropy should be made to Pi Beta Phi Foundation: The Literacy Fund – Arrow in the Arctic.

THE LITERACY ADVOCACY PROJECT

The Literacy Advocacy Project is an advocacy training program presented by Pi Beta Phi in partnership with the Barbara Bush Foundation for Family Literacy. By asking urgent questions like “how are you educating others?” you will leave the training session with a personalized plan for how you can help spread awareness for the importance of literacy efforts. Our highly interactive training program is designed to prepare you to be an advocate for literacy in your community. This program is built to help facilitate conversation about how you can become an advocate in your everyday life. The program will explore all aspects of literacy advocacy—why it's important, how you can make an impact and what is needed to become an agent of change. At the end, you'll leave with a personalized plan for how to increase literacy awareness in your community. The advocacy training sessions are open to members and non-members and free of charge.



PLANNING FUNDRAISING AND SERVICE EVENTS

It is the responsibility of the chapter Vice President Community Relations and alumnae club leaders to research local needs and present service opportunities in which the group may participate. Community service is more than a cash contribution from your chapter or club. Personal involvement and time served will provide more lasting benefits for both members and those served. Pi Phi alumnae can be a valuable resource in identifying local service opportunities and providing key contacts for collaboration. Many chapters and alumnae clubs also participate in fundraising activities sponsored by other campus and community organizations. It is the responsibility of the chapter or alumnae club leadership team to ensure all guidelines as they apply to fundraising and service events are observed.

PLANNING YOUR COMMUNITY RELATIONS CALENDAR

As a chapter or alumnae club leader, it is your responsibility to take into account two key considerations in planning your philanthropy and community service activities during the year:

- How many activities or events can you and your committee(s) realistically coordinate and offer during the year?
- How much time can you realistically expect the average chapter or alumnae club member to devote to these events each week or month?

It is vital you work with the members of your chapter or alumnae club's leadership team to ensure the chapter or alumnae club is not over-programmed. Be especially careful to not schedule activities during key times in the year, such as during midterms, finals or holidays.

PHOTO AND VIDEO RELEASE AND WAIVER PRACTICE

In the interest of protecting the identity of children and obtaining copyright of images, beginning January 1, 2014, all minors photographed at Pi Beta Phi events must have consent from a parent or legal guardian. This includes, but is not limited to, video, recorded voice and photographs. Consent must be obtained before photos are posted on chapter/alumnae club websites, social media or submitted to *The Arrow*. The Photo and Video Release and Waiver Form can be found in the [Resource Library](#).

MOTIVATING YOUR MEMBERS TO PARTICIPATE

There are a number of ways to motivate chapter and alumnae club members to get excited about philanthropic and community service opportunities. Below are some best practices:

- Educate chapter and alumnae club members on the cause—they are much more likely to actively participate in an event if they understand the cause
- Offer points in the chapter's points system
- Offer incentives such as treats and prizes
- Publicly recognize and thank members for their contributions
- Poll your chapter or club members for causes they would be interested in supporting or already support
- Create friendly competition between Pi Phi "families," classes, groups etc.
- Open the invitation to friends, significant others, other fraternity and sorority organizations, etc.
- Allow members to gain leadership experience by helping lead the project
- Tie it back to our core values
- Lead by example and have fun!

CHAPTER FUNDRAISING

Most contributions to Pi Phi philanthropies come from our own members—collegians and alumnae. Which means the level of impact Pi Beta Phi Foundation has on our sisterhood and communities is thanks to our own members' hard work and generosity. To ensure Pi Phi's impact is meaningful and continues to create positive change, chapters are encouraged to fundraise annually and make annual contributions to our Foundation. All contributions to our Foundation or other charities must be voted upon by the chapter and be reflected in the chapter meeting minutes.

Chapter fundraising events to support these contributions should not consist of assessing members through fees or ticket selling. The idea should be to solicit contributions throughout your campus or local community for a worthwhile project that every member can describe and believes is a worthy endeavor. Use your community resources, publicize the event and plan it with good risk management in mind. Some helpful resources for chapter fundraising can be found in the Resources section below.



FUNDRAISING GUIDELINES

*Very specific guidelines and procedures, set forth in the Chapter Fundraising Guide, **must** be followed. Please work closely with the Vice President Finance/Housing (VPFH) and your AAC counterparts.*

Because the Fraternity has been granted tax-exempt status under Section 501(c)(7) of the tax code, we must follow very strict and specific Internal Revenue Service mandates when participating in fundraising activities. The Pi Beta Phi Constitution and Statutes also speak to fundraising and solicitations. Pi Beta Phi chapters shall adhere to the following guidelines for fundraising:

- When planning a fundraising event, make certain the proceeds will exceed the cost of putting on the event.
- Chapters or individual chapter members may not solicit funds from alumnae, alumnae clubs, collegiate members or other chapters even if it is done on behalf of another organization. If a chapter becomes aware of anyone doing so, a Grand Council member should be notified.
- Solicitations to benefit a chapter house are to be conducted by the Chapter House Corporation or the Fraternity Housing Corporation.
- All net fundraising proceeds (after all expenses have been paid) shall be donated to **recognized charities or educational institutions** such as Pi Beta Phi Foundation (qualified under Section 501(c) of the Internal Revenue Code in the United States or as a Registered Charity in Canada). The Vice President Community Relations (VPCR) should contact their AAC Community Relations Advisor or Regional Team if there is any question about the appropriateness of the proposed donation. All contributions must be voted upon by the chapter and be reflected in the chapter meeting minutes. The VPCR should work with the Vice President Operations (VPO) to report the gross receipts, the expenses and the net proceeds to the chapter, and make a motion to donate the net proceeds to Pi Beta Phi Foundation (The Literacy Fund, Friendship Fund, Holt House, Arrow in the Arctic, etc.) or to another charity for which the fundraising event was held. The VPCR should refer to the Fundraising Tracking Sheet in the [Resource Library](#) to ensure the VPCR and VPFH are aligned and communicating.



- Chapters may only fundraise to support charitable organizations. This restricts chapters from fundraising for chapter activities such as recruitment, social functions or programming. Chapters may not sponsor, or give an appearance of sponsoring, fundraisers for members or other individuals in tragic personal circumstances. For example, a chapter may not fundraise for the expenses of a member with cancer, but it could fundraise for a cancer research foundation. *Note: Chapters may support the Emma Harper Turner Fund and encourage members in dire circumstances to apply for a grant.*
- Any printed materials (posters, flyers, invitations and notices) must state that donations are not tax-deductible to the donor. This IRS requirement is true even if proceeds will eventually be given to another organization that does qualify for tax-deductible donations.

The chapter should donate the funds to the charity described in the event's promotional materials. For example, funds for an event raising money for the Literacy Fund should not be donated to the Friendship Fund. An event may be held for multiple charities.

- When a chapter participates in a fundraising event sponsored by another campus group, chapter checks should be made payable directly to the charity which is the beneficiary of the event, not to the sponsoring fraternity or sorority, EXCEPT FOR an entry fee to participate in their philanthropy event. Such entry fees may be budgeted as, and recorded against, the Gifts & Flowers account in greekbill. Coordinate with the VPFH to ensure all payments to other campus groups are handled correctly. In all other cases, individual members may purchase tickets or donate through the group, but chapter checks should not be used for this purpose.
- Chapters may accept payment for fundraisers via cash, check or credit card through certain approved merchant services. These approved merchant service providers are Square, PayPal, memberplanet and EventBrite. Very specific guidelines and procedures, set forth in the Chapter Fundraising Guide, **must** be followed. Please work closely with the VPFH and your AAC counterparts if you intend to use an approved merchant services provider.



FUNDRAISING EVENT CONSIDERATIONS

Connect with your Vice President Risk Management (VPRM) and refer to the Event Planning and Management Guide on the [Resource Library](#) for specifics on planning guidelines.

It is the responsibility of the Chapter Leadership Team to ensure all guidelines as they apply to fundraising and service events are observed. Below are some rudimentary considerations:

- **Liability:** Fundraising and service events require a great deal of planning and coordination as they may present extraordinary liability exposure, especially if there is an athletic element involved. Events should be safe for both members and non-members. Activities such as dunk tanks, skydiving or bungee jumping would certainly be considered high risk. If a chapter fundraising or service event was to require individuals to participate in these or similar events and an accident were to occur, the Fraternity's insurance policy may not cover the incident. When planning major activities with a high, inherent risk, please contact the Fraternity's insurance carrier early on to determine whether the participants would be covered by our policy.
- **Under no circumstances should any fundraising or service event involve alcohol.**
- **Contracts:** All contracts for facilities or services must be signed by the Chapter President.
- **AAC involvement:** All events should be discussed and reviewed with the AAC prior to finalizing plans, allowing plenty of time to make changes if necessary. Contracts, leases, certificates of insurance, waivers, etc. should be reviewed by the AAC and local counsel prior to signing by the Chapter President. Helpful resources including event planning timelines and checklists can be found on memberplanet at pbpsuccess.memberplanet.com.
- **Appropriateness of events:** All events should be planned with the mission and core values of Pi Beta Phi in mind. Events should be perceived in a positive light by the general public.

RECOGNITION FOR PI PHI CHAPTERS

According to the Pi Beta Phi Constitution and Statutes, all chapters are required to make annual contributions to Pi Beta Phi philanthropies as directed by Grand Council. Please refer to the Monthly Chapter Evaluation for specific criteria and recognition.

Work with the VPFH to ensure contributions are made in a timely manner. The Chapter Contributions Report found under the Community Relations tab in [eReports](#), sets forth your chapter's fundraising goals and status in achieving those goals. Refer to this report throughout the year to confirm that our Foundation's records align with yours.

If a chapter's fundraising proceeds are not enough for the chapter to meet its contribution goals on the Monthly Chapter Evaluation, the chapter may wish to amend its budget to use excess funds from other categories such as recruitment or social events towards the required contributions. This requires involvement of the Budget Committee and a chapter vote. This must be done well in advance of the end of the calendar year. The VPCR and VPFH cannot, on their own, simply agree to make the additional contributions needed to receive the desired ranking on the Monthly Chapter Evaluation in December. Ask the VPFH to refer to the Ongoing: Budget and Maintenance section of the Budget and Expenses Guide and the Fundraising Tracking Sheet in the [Resource Library](#) for further information.

Monthly Chapter Evaluation: Community Relations Section

Chapter fundraising, participation and achievements in their various literacy service initiatives are reported in the Monthly Chapter Evaluation. See the Monthly Chapter Evaluation for the specific standards chapters are expected to achieve as well as other opportunities for advanced recognition. See also the Collegiate Awards Guide in the [Resource Library](#).

Community Relations Report

This report is for public relations purposes to help champion the philanthropic traditions of Pi Beta Phi, its chapters and the National Panhellenic Conference. The totals are not a factor in judging any standard on the Monthly Chapter Evaluation nor are the amounts listed used for determining Fraternity awards.

For required chapter fundraising efforts to Pi Beta Phi Foundation, including Friendship Fund and The Literacy Fund, please see the Chapter Contributions Report. Be sure to print a copy of the completed report for the VPCR so they can help promote the chapter's philanthropy and community service.



RECRUITMENT: PHILANTHROPY ROUND

Many chapters have incorporated philanthropy into their recruitment efforts, including both descriptions of Pi Phi philanthropies as well as small service projects. The VPCR should ensure accurate information is offered regarding Read > Lead > Achieve and local literacy efforts. They should collaborate with the Vice President Recruitment (VPR) to ensure worthwhile projects are planned; see Destination Recruitment: Philanthropy Round for recruitment ideas.

KEY DATES & DEADLINES

- **June 30:** Deadline for all donations from winter/spring fundraising events
- **Early December:** Coordinate with the VPFH to ensure all donations from fall fundraising events are made no later than December 31. Donations and FT Forms must be postmarked by December 31 to be attributed to the calendar year.
- **December 31:** All required donations due, including chapter gifts to Pi Beta Phi Foundation. Work with the VPFH to ensure donations have been sent on time and have been voted upon by the chapter.
- **On an ongoing basis:** Coordinate with the VPFH to report net fundraising results to the chapter and to make motions for chapter votes on all donations.

Notes on Deadlines/Reporting:

- Depending on the method of submission for each report or form, “due date” means the date entered in eReports, postmarked if mailed or sent if emailed.
- If circumstances outside your control will impact your ability to meet a deadline, dispensation must be granted by your Regional Team **prior** to the deadline.
- Allow ample time for the AAC to thoroughly review/verify reports and sign off prior to submission.
- While there are not many Fraternity-set deadlines for the VPCR, there are many self-imposed deadlines based on the dates of your philanthropy events. Work with your VPRM, AAC Risk Management Advisor and AAC Community Relations Advisor for assistance.



RESOURCES FOR CHAPTERS

- For questions about Pi Beta Phi Foundation, see pibetaphi.org/foundation or email fndn@pibetaphi.org
- To request a visit by a Pi Beta Phi Foundation staff member or volunteer, email fndn@pibetaphi.org or call us at (636) 256-1357
- [Resource Library](#)
- Local procedure notebook
- [Wine and Silver Blue News](#)
- For questions regarding Fraternity philanthropies, including Read > Lead > Achieve and Arrow in the Arctic, contact literacy@pibetaphi.org or the Director Community Relations at dcr@pibetaphi.org
- For memberplanet fundraising resources including event checklists, timelines and templates, visit pbpsuccess.memberplanet.com
- For questions regarding memberplanet fundraisers, contact Development and Engagement Manager Megan Schwedtmann at mschwedtmann@pibetaphi.org

ALUMNAE CLUB FUNDRAISING

The majority of contributions to Pi Phi philanthropies come from our own members—collegians and alumnae. Which means the level of impact Pi Beta Phi Foundation has on our sisterhood and communities is thanks to our own members' hard work and generosity. To ensure Pi Phi's impact is meaningful and continues to create positive change, alumnae clubs are encouraged to fundraise annually and make annual contributions to our Foundation. All contributions to our Foundation or other charities must be voted upon by the alumnae club and be reflected in the alumnae club meeting minutes.

The idea should be to solicit contributions from your local community for a worthwhile project that every member can describe and believes is a worthy endeavor. Use your community resources, publicize the event and plan it with good risk management in mind.

FUNDRAISING GUIDELINES

Your Foundation staff can help your club maximize its impact with the following opportunities for alumnae club giving:

- Make your alumnae club gift count! Submit a completed Alumnae Club Foundation Giving Form with your gift, which can be found in the [Resource Library](#). Help us know where your gift should be applied so your alumnae club gets the credit it deserves. You can designate your gift in many ways, including making tribute gifts—all on one simple form.
- Pi Beta Phi Foundation is happy to support your club's fundraiser through our partnership with memberplanet. Memberplanet is an online, one-stop-shop for customizing club philanthropy event pages, with additional social media marketing tools, broadcast and reporting features to make your club philanthropy events a success. Philanthropy event registration is paid online via the club philanthropy events page or mobile app. All proceeds are directly deposited to the club's bank account when the event closes. Once philanthropy events proceeds have been received, the club follows Pi Beta Phi recommended donation procedures. Deduct all event expenses from total proceeds, before donating the net amount raised to Pi Beta Phi Foundation, utilizing the appropriate Alumnae Club Foundation Giving Form to indicate the club's desired designation. Some clubs have used memberplanet to complement annual major fundraisers, driving towards a larger total dollar raised by the effort.



- Looking for an educational program to add to your alumnae club annual calendar? What if that program could also promote Pi Phi's core value of Philanthropic Service to Others? Our Foundation has developed several short programs designed to be facilitated at your club meeting by a Foundation representative. Topics may include women in philanthropy, estate planning for all Pi Phis and a general Foundation overview.

KEY DATES & DEADLINES

- **March 2:** Fraternity Day of Service
- **April 1:** Alumnae Club Philanthropy and Community Service Report due
- **September:** Read > Lead > Achieve® Month
- **September 1:** FDS500 nominations due
- **December 31:** All contributions to Pi Beta Phi Foundation must be made by this date to ensure eligibility for awards or recognition. Donations and FT Forms must be postmarked by December 31 to be attributed to the calendar year.

RESOURCES FOR ALUMNAE CLUBS

- For questions about Pi Beta Phi Foundation, visit pibetaphi.org/foundation or email fndn@pibetaphi.org
- To request a visit by a Pi Beta Phi Foundation staff member or volunteer, email fndn@pibetaphi.org or call us at (636) 256-1357
- [Resource Library](#)
- Local procedure notebook
- Carnation Connection emails
- For questions regarding Fraternity philanthropies, including Read > Lead > Achieve and Arrow in the Arctic, contact literacy@pibetaphi.org or the Director Community Relations at dcr@pibetaphi.org
- For memberplanet fundraising resources including event checklists, timelines and templates, visit pbpsuccess.memberplanet.com
- For questions regarding memberplanet fundraisers, contact Development and Engagement Manager Megan Schwedtmann at mschwedtmann@pibetaphi.org

