Western Golf Association
Evans Scholars Foundation

History, Challenges, Opportunities

2013
## Contents

**Western Golf Association/Evans Scholars Foundation**

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Western Golf Association | Evans Scholars Foundation
Western Golf Association

- Founded in 1899, the Western Golf Association conducts championships for professional and amateur golfers, promotes the use of caddies, and oversees the Evans Scholars Foundation, which awards college scholarships to caddies with limited financial means.

- The WGA is a driving force in the game, a respected charitable cause for thousands of supporters, and a distinguished leader in the nation’s golf community.

Evans Scholars Foundation

- The WGA champions education through golf in sponsoring the Evans Scholars Program. The program provides full tuition and housing scholarships to deserving caddies across the country. Currently, 835 caddies are attending college on Evans Scholarships and there are more than 9,600 Evans Alumni across the country. Most Scholars attend one of the 14 universities where the Foundation owns and operates a Scholarship House.

- Most of the program’s funding comes from contributions made by more than 100,000 donors across the country, including a core group of WGA Evans Scholars Par Club members, many of whom are Evans Alumni. Total cumulative Alumni giving has surpassed $62 million. In addition, the Evans Scholarship Program is the sole beneficiary of the annual BMW Championship, the third of four events in the PGA TOUR Playoffs for the FedExCup. The championship, formerly the Western Open, has raised over $50 million cumulatively for the Evans Scholarships.
History

Caddies to College

- In the early years of the Western Golf Association, the sole focus of the organization was to conduct its three national golf championships, including the Western Open (now the BMW Championship), the Western Amateur and the Western Junior.

- In 1929, famed golfer Charles “Chick” Evans Jr., asked the WGA to administer a fund he had established some years earlier to award college scholarships to caddies from modest means. He could think of no finer organization to entrust with his legacy and grow his vision. The first two Evans Scholars enrolled at Northwestern University in 1930. Others soon followed, and the focus of the WGA began to shift to include its new mission of sending caddies to college.

- When Chick’s original investment was exhausted, the WGA Directors perpetuated the caddie scholarship program by leaving money on the board room table after a day of interviews and selections. This “collection plate” process was the sole means of revenue through the early 1940s, when WGA began to solicit funds outside the Association.

- Today, the Evans Scholars Foundation is one of golf’s leading charities, with 9,600 Evans Scholars graduates and 835 Scholars currently in school. Thousands of golfers contribute annually to the Evans Scholars program, but the need continues to grow as the costs for these tuition and housing scholarships now exceed $12 million annually.
Evans Scholars Achieve Success

The Evans Scholarship is both a generous award and a serious responsibility. The Scholarship is awarded annually and renewable for up to four years. All recipients are expected to live up to the high standards and tradition of excellence for which the program is well-known. These standards safeguard the investment in education that all our supporters make through the Evans Scholars Foundation. Each of our students understands the expectations placed upon him or her, demonstrated by a cumulative 3.25 GPA and a 92 percent graduation rate. The four pillars of our Evans Scholars program include:

- **Scholarship** – The primary obligation of an Evans Scholar is academic success. For the academic experience to be most meaningful, Evans Scholars are committed to achieving the greatest possible level of academic success.

- **Leadership** – Evans Scholars are actively involved in chapter affairs and participate in campus and community activities outside the chapter.

- **Chapter Living** – The merits of the Evans Scholarship House program are found in the experience of group living. Every Evans Scholar learns to live and work effectively with the other members of the chapter.

- **House Maintenance** – Each Evans Scholar shares responsibility for the upkeep of the Scholarship House. All Evans Scholars perform certain duties essential to maintaining the cleanliness of the house.
Growing Need

The Need Continues to Grow

- As the Evans Scholars Program expanded in the 1940s and 1950s, new sources of revenue were needed to keep pace with the increasing costs.

- In 1950, the WGA founded the Evans Scholars Par Club to enlist contributors willing to give $100 annually to support the Evans Scholars program. From 100 initial members in 1951, the Par Club has grown to include thousands of generous contributors today.

- For most of the past 60 years, Par Club contributions – combined with proceeds from the WGA-sponsored professional championship – provided enough revenue to keep pace with the program’s growth and the growing cost of college tuition. However, in recent years, tuition costs have risen dramatically and it has become more of a challenge to cover the rising costs.

- In addition to the rising cost of education, the applications have been on the rise. The need for college aid for many young men and women also has grown in recent years as families face unforeseen financial hardships due to the downturn in the U.S. economy. This has been evidenced over the past three years, as the WGA has received a record number of applications for the Evans Scholarships.
Applications for the Evans Scholarship are at an all-time high. The number of applications received each year will continue to increase as the WGA takes steps to strengthen caddie programs around the country and expand the geographic footprint for receiving applications.

Tuition and housing costs have risen drastically in last five academic years to nearly $12 million in the 2012-2013 Academic Year. Education costs are projected to increase at a estimated rate of 5% per year. The number of Evans Scholars in school will also rise as more Scholarships are awarded incrementally each year.

* AY = Academic Year
Overview Giving Opportunities

Ways to Give – Overview

The WGA Evans Scholars Par Club remains the core fundraising program for the Evans Scholarships. However, this traditional source of revenue, combined with other traditional revenue sources, no longer covers our program costs. To meet our annual operating expenses for the Evans Scholarships and to build for the future, the WGA has developed new opportunities for giving. Currently, there are seven major areas of giving opportunities:

I. Basic Par Club Giving
   • The core fundraising vehicle for the Evans Scholarships continues to be the WGA Evans Scholars Par Club, with thousands of golfers from across the country donating $250 or more annually to help the WGA/ESF cover its yearly tuition and housing commitments for current Evans Scholars.

II. 2013 Match Play Challenge
   • A Major Par Club Gift at a level of $2,500 or greater may be made in conjunction with the 2013 Match Play Challenge. These gifts will be matched through the generosity of our Matching Pool Partners, whose gifts of $50,000 & greater fund a matching pool.

III. Endowment Fund
   • A major gift to the Evans Scholars’ Roland F. McGuigan Endowment Fund helps to secure the future of the Evans Scholarships by building a base to fund an increased number of scholarships. For a gift of $125,000 to the McGuigan Fund, the WGA creates a permanent Endowed Named Scholarship in your name or in the name of a person or club you would like to be recognized.
IV. Chick Evans Planned Giving Society

A major commitment to the Evans Scholars program also may be made through a planned gift, such as a bequest in your will or by designating the Evans Scholars Foundation as the beneficiary of an IRA or life insurance policy in your name. These gifts may be designated for annual operating funds or for the Endowment Fund.

V. Capital Campaigns

Another opportunity to support the Evans Scholars is offered through capital campaigns, which we conduct as needed for renovation and construction of new Scholarship Houses at the 14 universities where Evans Scholars enjoy group living. The Evans Scholars Foundation owns and operates Scholarship Houses at the following universities:

- University of Colorado
- University of Illinois
- Indiana University
- Marquette University
- Miami University
- University of Michigan
- Michigan State University
- University of Minnesota
- University of Missouri
- Northern Illinois University
- Northwestern University
- Ohio State University
- Purdue University
- University of Wisconsin

Current capital campaigns and renovations are scheduled for the University of Illinois, Marquette University and Miami University.
VI. BMW Championship

- The BMW Championship, the third of four PGA TOUR Playoff events for the FedExCup, is conducted annually by the WGA, with all proceeds benefiting the Evans Scholarships. The 2013 BMW Championship will be held September 9-15 at Conway Farms Golf Club in Lake Forest, Illinois. Since 2007, the championship has raised $11 million to help send Evans Scholars caddies to college.

VII. Special Events

- The Evans Scholars Foundation also benefits from the generosity of donors through their participation in a variety of events throughout the year. In 2013, these events include: more than 40 special Evans Scholars fundraising outings nationwide, such as the Evans Scholars Invitational set for July 29; our third annual Green Coat Gala planned for November 6; and the annual Bandon Dunes Charity Golf Retreat scheduled for May 7-9.

On the following pages are more detailed descriptions of each of the Evans Scholars Foundation giving opportunities.
I. WGA Evans Scholars Par Club

The WGA Evans Scholars Par Club is the primary fundraising vehicle for the Evans Scholarships. Thousands of donors nationwide contribute $250 or more annually to help the WGA/ESF meet its financial commitment to fund tuition and housing scholarships for current Evans Scholars.

Giving levels for the Par Club include:

- Match Play Partner $50,000+
- Evans Patron $25,000 - $49,999
- Platinum $10,000 - $24,999
- Gold $5,000 - $9,999
- Silver $2,500 - $4,999
- Hole-In-One $1,000 - $2,499
- Eagle $750 - $999
- Birdie $500 - $749
- Par $250 - $499

For Silver and higher giving levels in 2013, gifts will be matched through the Match Play Challenge.
II. 2013 Match Play Challenge

The Match Play Challenge is a matching gifts program in which a group of generous donors seed a matching pool. Then any gift of $2,500 and greater made through the Par Club is matched from this pool, dollar for dollar. In 2011, 6 donors made gifts of $300,000 each to seed the matching pool for a total of $1.8 million. In 2012, 19 donors made gifts of $100,000 or more to seed a matching pool of $2.15 million. The 2013 campaign aims to collect 50 gifts of $50,000 or more, creating the largest pool yet, $2.5 million.

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<th>2011 Match Play Partners: Matching pool of $1.8 million</th>
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<td>Kevin &amp; Susan Flynn</td>
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<td>Mike &amp; Lindy Keiser</td>
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<td>Jim &amp; Molly Perry</td>
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<th>2012 MATCH PLAY PARTNERS: MATCHING POOL OF $2.15 MILLION</th>
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<td>Sam &amp; Marsha Allen</td>
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<td>Steve &amp; Karis Colnitis</td>
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<td>Fritz &amp; Glenda Corrigan</td>
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<td>Jim &amp; Karen Frank</td>
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<td>Mike &amp; Lindy Keiser</td>
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<td>Tom &amp; Sandra Mallman</td>
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**Step Up To the Tee** is the name of the 2013 Annual Operating Campaign, encompassing both Basic Par Club Giving and the Match Play Challenge. This central theme is designed to invite our donors to Step Up To the Tee in supporting the Evans Scholars Foundation, no matter how large or small their level of potential support may be.

Last year was the first time we had developed an overarching campaign theme with **I Am A Caddie**. The uniform look and feel of our collateral materials provided consistency in our messaging and allowed us to tell the Evans Scholar story in an exciting way. The Step Up To the Tee Campaign materials are designed to build upon the successes of last year and convey our story in an even more compelling way.

Targeted versions of the marketing materials will be distributed to all Par Club members in June and there will be follow-up messaging throughout the year to encourage participation.
III. McGuigan Endowment Fund

The WGA Evans Scholars McGuigan Endowment Fund was established in 1989 to provide protection against unforeseen fiscal challenges which could threaten the financial stability of the Evans Scholars Program. It is named in honor of Roland F. “Mac” McGuigan, the program’s first educational director, whose visionary guidance and tireless spirit fueled the program’s growth during his 41 years with the Evans Scholars Foundation (1948-1989).

There are two major avenues for giving to the Endowment Fund:

- **An Endowed Named Scholarship.** Individuals and families, WGA member clubs, corporations and private foundations may establish an Endowed Named Scholarship for a contribution of $125,000. Donors giving to an Endowed Named Scholarship have the opportunity to experience a more personal touch to their giving through the action of selecting a specific Endowed Named Scholar and by following the progress of their Named Scholar through four years of college life and beyond. *For more on Endowed Named Scholarships, please see the following page.*

- **A Cash Gift or Pledge.** An individual, direct major cash gift or a pledge payable over a number of years offers opportunities for special recognition of individuals, with a variety of options available through naming of certain activities within the program or of facilities at specific scholarship houses.
IV. Endowed Named Scholarships

Endowed Named Scholarships may be named in honor of the donor(s) or of others the donor(s) designates, such as a family member, a WGA member club, a long-time club member or a respected club employee, such as a PGA professional or caddie manager, or to recognize other supporters of golf, caddies and education.

- With a contribution of $125,000, payable in a single year or up to five years, an Endowed Named Scholarship Fund is established within the following guidelines:
  - Every four years, one Evans Scholar is awarded the Named Scholar Distinction.
  - The Endowed Named Scholarship Fund is listed in perpetuity in the annual WGA Evans Scholars Donors Report.
  - Only the interest earned off the principal amount is used to pay for tuition, thus preserving the future funding of the Scholars.
  - A contribution of $500,000 allows a Named Scholarship to be awarded annually, with up to four current Named Scholars enrolled at the same time at one of the 14 universities where the ESF owns and operates an Evans Scholarship House.
The Chick Evans Planned Giving Society

V. The Chick Evans Planned Giving Society

The Chick Evans Society has been established to honor and recognize our generous donors who have made a planned gift to ensure the legacy of the Evans Scholars Foundation. Planned gifts may be designated to be placed in the Endowment Fund, restricted to specific uses or be unrestricted gifts that support the WGA/ESF’s general operating fund at the time the gift is realized.

Planned gifts honor the mission of founder and golf great Charles “Chick” Evans Jr., who fulfilled his dream of sending caddies with modest financial means to college and provide a financial foundation to ensure the legacy of the Evans Scholars Foundation.

Planned Gifts may include:

- A bequest made through the donor’s will. This is the most common type of planned gift and is often denoted as a specific dollar amount or as a percentage of one’s estate. Donors are able to preserve needed living expenses, as the bequest is made at death. Endowed Named Scholarships also can be initiated upon death for a planned gift of $125,000 or greater.

- Gifts from an IRA, 401K or other retirement plans. Retirement plan assets are taxed heavily at transfer to your heirs, so these gifts offer a simple and tax-efficient way of transferring wealth to a charity.

- Life insurance. The simplest way to make a life insurance gift is to name the Evans Scholars Foundation as a beneficiary of an existing policy. As you periodically review your life insurance portfolio, consider designating the Evans Scholars as an additional beneficiary.

- Other giving options also are available, including life income plans and charitable remainder trusts. Our Development staff can assist in explaining other options and, as for all planned giving, we recommend you obtain the counsel of a qualified attorney.
VI. BMW Championship

The 2013 BMW Championship, set for September 9-15 at Conway Farms Golf Club in Lake Forest, Illinois, offers a full range of sponsorship opportunities for golf fans who also want to support the championship’s sole charitable cause, the Evans Scholarships for caddies. The top 70 players on the PGA TOUR will be facing off in this third of four Playoff events for the FedExCup, with the top 30 after the BMW Championship qualifying for the The TOUR Championship September 19-22 at East Lake Golf Club in Atlanta. Watch defending champion Rory McIlroy compete against the top names in golf, such as Phil Mickelson – and two of our Western Golf Association Directors, Luke Donald and Mark Wilson – for an $8 million purse and a first place prize of $1.44 million. Future sites of the BMW Championship include Cherry Hills Country Club in Cherry Hills Village, Colorado, in 2014.

Sponsorship opportunities include:

18th Hole Marquees

- A private air-conditioned tent and patio overlooking the 18th hole for 150 guests each day of the championship competition, Thursday – Sunday.

12th and 14th Hole Chalets

- Private tents and patios for 75 guests each day sitting along the 12th and 14th holes for all four days of the championship competition with great views of golf.

Champions Club

- The Champions Club is a shared hospitality venue located within Crooked Stick’s clubhouse. Package includes 12 tickets each day of the championship and are all-inclusive of food and beverage.
VII. Special Fund-Raising Events

A series of special fundraising events held throughout the year raise a total of more than $1 million annually for the WGA/ESF operating fund for current tuition and housing scholarships. Some of the events are organized and conducted by the WGA, while others are planned and hosted by Evans Alumni, WGA Directors, member clubs and other friends of the organization. These special events offer additional opportunities for donors to support the Evans Scholars through sponsorships and other forms of participation. Following are three of the major events on the fundraising calendar.

Bandon Dunes

- The annual Bandon Dunes Golf Retreat in May raises significant funds for the Evans Scholars. The three-day golf outing at the acclaimed Bandon Dunes golf destination has been very well received by friends of the program. The annual retreat is planned for May 7-9, 2013.

Evans Scholars Invitational

- The 2013 Evans Scholars Invitational is set for Monday, July 29, at Glen View Club in Golf, Illinois, and North Shore Country Club in Glenview, Illinois. This annual event, sponsored and hosted by Evans Alumni, offers various sponsorship opportunities. This event – which celebrates the Evans Scholars Program with its Alumni during the height of the golf season – includes golf and dinner with a featured guest speaker.

WGA Green Coat Gala

- The Western Golf Association is celebrating its third annual Green Coat Gala on November 6, 2013, at The Peninsula Chicago, with all proceeds benefiting the Evans Scholarships. To take part in this evening celebrating golf and the Evans Scholarships, donors are offered a series of sponsorship options. The 2013 special guest will be Jack Nicklaus.
For More Information

To learn more about how you can help the Western Golf Association/Evans Scholars Foundation fund full tuition and housing Evans Scholarships for caddies, please contact:

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