



LYCEUM
INSTITUTE

INQUIRE | ORDINARE | MEMORARE

ENDOWMENT FUND

SECURING THE FUTURE OF EDUCATION

Purpose and Objectives

An Endowment Fund for a non-profit organization such as the Lyceum Institute is a dedicated financial reserve, invested to generate income that supports the Institute's mission by providing long-term stability. The principal amount remains intact while generated returns fund operational expenses, ensuring sustainable growth and development.

This Fund will transform our organization from a startup to an established institution providing the future of education and will develop our standing as leaders in the movement of education outside the academy. By establishing an Endowment, the Lyceum Institute will be able to provide salaries and benefits for a full-time Faculty including all Administrative Personnel, as well as to provide support for our other operating costs such as research, technology, and publication.

Goals and Gifts

Our financial goal is one of **long-term institutional sustainability**. Through careful and safe investment of endowment funds, one can anticipate an average annual return of 4.5%. Some years will provide higher returns, and some lower, but with careful planning we can attain a stable income that covers all our needs.

We are dividing our funding goals into three distinct target phases:

- Establishment Phase, targeting \$5,000,000 by mid-2027.
- Development Phase, targeting an additional \$10,000,000 by mid-2031 (\$15,000,000 total).
- Continued Growth Phase, which will seek a gradual expansion of the Endowment after the first seven years for a proportionate expansion of our program, Faculty, etc., as deemed necessary.

Maintaining a principle of subsidiarity, we aim to keep growth proportionate to a realistic quantity of human relationships. Thus, even reaching the Continued Growth Phase, the aim should be primarily to strengthening the existing program and structure, rather than expanding it, except as deemed necessary or fitting.

Why Give to the Lyceum Endowment

We believe that the world has entered a new paradigm for education and intellectual development. This new paradigm, however, needs to retrieve what it properly means to be an educated human.

Put otherwise: Is education nothing more than a preparation for "real life"? Many mainstream institutions seem to think so—while becoming ever-more-detached from reality itself and ever-less-capable of teaching

what is real. By contrast, we are dedicated to changing the constitution and perception of education by providing a new model. This model holds itself to the principle that education is not extrinsic to the person, but rather belongs to the individual and is realized through his or her intellectual habits. As such, institutions which provide education must view it as an integral part of life itself, rather than a limited course pursued towards a determinate goal.

We believe that this integration can be affected by persistently engaging in three mental activities: **inquiring** (*inquirere*); **ordering** (*ordinare*); and **remembering** (*memorare*). By learning to inquire, we discover what we do not know. By learning to order, we discover what we ought to know, or to know better. And by learning to remember, we may build upon past discoveries toward greater heights of understanding. Developing these activities into intellectual habits sharpens one's interpretation of all phenomena. Our Faculty serve as expert guides in the virtuous direction of these habits, exhibiting their practice through lectures, guidance in reading and discussion, and in their writings: not only teaching what they know, but seeking out further learning still. By teaching philosophy seminars, Trivium and Language courses, and developing unique programs and opportunities for study that fit diverse schedules and adapt to their content, the Faculty bring students deeper into the habit of thinking.

As a whole, the Lyceum Institute community (including not only enrolled members but also the general public who may participate in individual philosophy seminars) demonstrates an approach to education unconstrained by the limits of time, geography, and cost—superseding the limited and outmoded approach to learning which has become the norm.

Our Benefactors share and support this vision: bolstering our Institute not as a material investment nor to accomplish a short-term goal, but to **revitalize education for decades and even centuries to come**. Through gifts to the Endowment Fund, our Benefactors act as stewards for culture, providing generations of students the opportunity to pursue true intellectual flourishing, and liberating minds most-dedicated to the truth from the oppressive strictures of contemporary academia.

We truly believe that our approach establishes a new paradigm for education, one that goes *beyond* the university. Donors to our Endowment act as founders for a new age of learning and understanding.

How You Can Help:

- **Friend of the Lyceum:** \$50 - \$999
- **Supporter:** \$1,000 - \$4,999
- **Patron:** \$5,000 - \$9,999
- **Benefactor:** \$10,000 - \$24,999
- **Founder:** \$25,000 and above

How to Contribute:

- Visit <https://lyceum.institute/support/endowment-fund/> to donate online.
- Send an email to kemple@lyceum.institute if you wish to donate via check.
- Consider a recurring or planned gift (bequest, charitable trust, or annuity) to help us plan more effectively for the future. Let us know if you would like more information about planned giving options.

- Check with your employer to see if they match charitable contributions. You can double the impact of your giving! Provide us with your employer's name and we will assist you with the necessary procedures.

Allocation

The initial goal of our Establishment phase is \$5,000,000, returns from which would be used to support core personnel and lay the groundwork for future developments and ancillary expenses, as well as building an initial Reserve Fund to ground resiliency. The Development phase goal of \$15,000,000 will provide returns sufficient for supporting the same personnel as the Establishment phase, plus several other full-time Faculty.

For full transparency, we have included an outline of our planned allocation for both phases.

Establishment

Goal: \$5,000,000

Expected Annual Yield: 4.5% (*Approximately \$225,000 per year*)

The Endowment is strategically structured to support our key personnel and operational needs, fostering growth and excellence. Here's the expected allocation of the annual yield through the Establishment Phase:

1. Personnel Salaries:
 - Three full-time personnel: \$155,000
 - Percentage of Annual Yield: 68%
2. Development:
 - A portion of the income will be dedicated to growing the Lyceum's programs, promotion, marketing, and pursuing the Development Phase.
 - Annual Allocation: \$40,000
 - Percentage of Annual Yield: 17.7%
3. Ancillary Expenses:
 - Covering ancillary operational costs such as research, travel, and publications.
 - Annual Allocation: \$30,000
 - Percentage of Annual Yield: 13.3%

Total Annual Expenditure: \$225,000

Development Phase

Goal: \$10,000,000 (\$15,000,000 total)

Expected Annual Yield: 4.5% (*Approximately \$675,000 per year*)

The Endowment is strategically structured to support our key personnel and operational needs, fostering growth and excellence. Here's the expected allocation of the annual yield through the Development Phase:

1. Personnel Salaries:
 - Annual Salary: \$415,000
 - Percentage of Annual Yield: 61.4%
2. Benefits:
 - Providing health insurance and a modest 401(k) contribution to full-time employees.

- Annual Allocation: \$75,000+
 - Percentage of Annual Yield: 11.1%+
3. Growth and Preservation of the Endowment Fund:
- A portion of the income will be reinvested for long-term sustainability.
 - Annual Allocation: \$55,000
 - Percentage of Annual Yield: 8.1%
4. Ancillary Expenses:
- Covering ancillary operational costs such as research, technology, travel, and publications.
 - Annual Allocation: \$60,000+
 - Percentage of Annual Yield: 8.9%

Total Annual Expenditure: \$605,000. Excess funds may be re-allocated into growth and preservation, reserve funds, or other ancillary expenses.

This allocation demonstrates our commitment to enhancing leadership and academic prowess. It underscores our dedication to responsible financial management, ensuring long-term benefits for our educational and research missions.

