

ALPHA DELTA STATE



OHIO

EDUCATIONAL
FOUNDATION

**2024 Foundation Report
ADSOEF Annual Meeting
April 6, 2024**

ADSOEF BOARD OF DIRECTORS

Brenda Armstrong, State Member, 2023-2025
Director, Marketing Committee

Linda Diltz, Beta Rho, 2023-2025 Director,
Fundraising Committee Co-Chairman

Debra (Debbie) Frazier, Beta Rho, 2021-2024
Director, Donor Relations Committee Chairman

Dr. Lois Harkins, Alpha Lambda, 2021-2024
Director, Treasurer

Millie Holzer, Beta Zeta, 2021-2024 Director,
Finance Committee Chairman

Diana Kirkpatrick, Alpha Delta, 2023-2025
Director, Board Chairman

Sue Loader, Alpha Psi, 2023-2025 Director,
Nominating Committee Chairman and
Governance Committee

Tammy Schroeder, Beta Eta, 2023-2025
Director, Governance Committee

Barbara Smith, Zeta, October 2023-2024
Director, Nominating Committee

Christine (Chris) Snoddy, Alpha Lambda, 2021-
2024 Director, Board Secretary and
Educational Services Committee Chairman

Melodie McGee, Gamma Nu, 2023-2025
OSO President, Ex-Officio Member

Note: Director email addresses can be found at adsoef.org under the **ABOUT US** tab.

ADSOEF HISTORY

Alpha Delta State Ohio, now known as Ohio State Organization (OSO), was the originator of Alpha Delta State Ohio Educational Foundation (ADSOEF). Members at the 2017 State Convention approved the establishment of the ADSOEF. Subsequently the A. Margaret Boyd Overseas Foundation organized in 1981 was renamed Alpha Delta State Ohio Educational Foundation.

ADSOEF is recognized as a non-profit 501(c)(3) private charity that began operation July 1, 2017. The ADSOEF provides funding that supports international studies and good will, and promotes educational excellence by providing scholarships, grants, fellowships and awards for the professional and personal growth of educators.

ADSOEF is managed by ten Directors. The first election was March 2017 at the OSO Convention General Session. Beginning in 2023, and yearly thereafter, five Directors will be elected for two-year terms. Beginning with the 2021 election, the President of OSO was invited to serve as ex-officio, non-voting member of the Board of Directors. The Board elects a Chairman, Vice-Chairman, Secretary, and Treasurer annually.

The official logo designed by Heather J. Storer, Alpha Chi Chapter, was revealed at the 2018 ADSOEF Annual Meeting. ADSOEF Bylaws were originally approved at the 2017 Annual Meeting. Starting in January 2022, our first newsletter was published electronically. Following a contest the newsletter was named, *Foundation Matters* in July 2022. Carol Dunlap, Alpha Eta Chapter, submitted the winning entry.

In 2019 Florence L. Woodward made a major contribution for member scholarships to be awarded in her name at Kent State University. In 2023 through a major bequest from Jane and Dorman Stein, The Jane Brundige Stein Scholarship/Grant was established for education and nursing students at The Ohio State University Marion Branch.

All members of OSO are also members of ADSOEF and can participate in the Annual meeting, serve on committees, volunteer for special activities, and serve as a director. No membership fee is required to be a member. Through the generous support of its members, ADSOEF is truly ***funding the future of excellence in education.***

ADSOEF Mission

The mission of ADSOEF is to provide funding to serve charitable purposes relating to professional and personal growth of educators and to promote educational excellence.

ADSOEF Purposes

ADSOEF exists for the purposes of raising, managing, and distributing funds to fulfill its mission.

...a word or two from the Chairman of the Board

Your Foundation, Alpha Delta State Ohio Educational Foundation (ADSOEF), continues to serve and work, openly and with transparency, with the OSO/ADSOEF membership by further advancing our mission and purpose of providing funding to serve charitable purposes related to professional and personal growth of our OSO educators and uplift the educational excellence in Ohio's communities. We continue to support the fundraising campaign to grow the funding of excellence in education. We have celebrated many successes this past year and will continue to do so as we continue our mission through 2024 and beyond.

Being the current chairman of the ADSOEF board, I have found numerous individuals and many aspects of the ADSOEF for whom I am especially grateful. On my thankful list, I want to include, the other nine Board of Directors, the ADSOEF committee chairs and their team of committee members, the OSO/ADSOEF liaisons, who endlessly collaborates with the ADSOEF, the OSO/ADSOEF membership, and last, but certainly not least, the abundant number of benefactors and supporters, whose charitable contributions and donations advance the ADSOEF mission of educational excellence and the professional and personal growth of educators in our Ohio organization. From student teacher grants to international study fellowships to individual classroom or community project funding to life-long learning pursuits, many deserving individuals have benefitted from the generosity of our donors. On a daily basis, our donors help to make a difference in the lives of today's educators and student learners, which ultimately assists to enhance our Ohio communities.

I am in awe of literally the hundreds upon hundreds of cumulative volunteer hours that it takes to have a functioning and productive organization such as the Alpha Delta State Ohio Educational Foundation. It is inspiring to witness firsthand the breadth and depth of the commitment of each individual who believes in the mission of our ADSOEF. There is no greater gift than surrounding yourself with those who inspire and encourage you. I feel blessed to be surrounded by individuals who do just that. I am truly humbled by and extremely fortunate to serve such an organization as ADSOEF. Many thanks to all who are involved in the many facets of ADSOEF. Please know your involvement, no matter at what level, is valued and immeasurable. I am sincerely grateful to each and every one of *you*. **Thank you** for your unwavering support...ADSOEF would not be what it is today without **YOU!**

My infinite thanks and gratefulness to all,

Diana L. Kirkpatrick

Chairman of the ADSOEF Board of Directors

Alpha Delta State Ohio Educational Foundation (ADSOEF)

Annual Meeting Rules of Order

In addition to the ADSOEF Bylaws and Meeting Policies and Procedures, the following Rules of Order shall apply to the ADSOEF Annual Meeting. Otherwise, *Robert's Rules of Order, Newly Revised*, 12th Edition, is the governing parliamentary authority.

The official prepared agenda shall constitute the Order of Business, subject to possible change by agreement of the members. The presiding officer may change the Order of Business, if deemed advisable.

Each meeting shall be called to order at the designated time.

The voting body is comprised of members of Ohio State Organization, thus ADSOEF.

Those members in attendance at the meeting shall constitute a quorum.

A member should refrain from speaking unless recognized by the presiding officer.

When a member has been recognized to speak, she begins by stating her name.

Each motion shall be in writing, signed by the proposer, listing the second, and sent to the presiding officer.

The member making the motion may speak first.

No member shall speak a second time on a matter under consideration until all others who wish to speak have had the opportunity to do so by common consent or the consent of the presiding officer. Each member may speak no more than two (2) times.

Members shall be called upon to speak alternating between those "pro" and "con".

Joyce Jones Weinkam
Parliamentarian

Approved _____



**ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION
ANNUAL MEETING AGENDA**

April 6, 2024

9:30 – 10:30 A.M.

**The Saint John Evangelical Lutheran Church
Grove City, Ohio**

Call to Order and Meeting Guidelines	Diana I. Kirkpatrick, Board Chairman
Approval of Minutes	Christine (Chris) Snoddy, Secretary
Treasurer's Report	Dr. Lois Harkins, Treasurer

Committee Reports

Nominating, <i>Election of Directors</i>	Sue Loader, Chairman
Finance	Millie Holzer, Chairman
Donor Relations	Debra Frazier, Chairman
Educational Services	Christine (Chris) Snoddy, Chairman
Fundraising	Linda Diltz, Co-Chairman
Marketing	Brenda Armstrong
Governance	Dr. Norma Kirby, Chairman
Fellowships and Grants	Marilyn Slusser, Liaison to OSO Scholarship Committee

Unfinished Business

New Business

Announcements

Adjournment Diana L. Kirkpatrick, Board Chairman

Joyce Joes Weinkam, Gamma Xi, is serving as Parliamentarian.

As stated in the ADSOEF Bylaws, Article VIII, Robert's Rules of Order Newly Revised (current edition) may guide ADSOEF proceedings in all cases to which they are applicable and in which this authority is not inconsistent with state or federal statutes and ADSOEF Articles of Incorporation and Bylaws.

Thank you...your support of ADSOEF is invaluable!



**ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION
2023 ANNUAL MEETING
MINUTES
April 14, 2023
Dublin Embassy Suites**

Eighty-four members were present for this sixth Annual Meeting. Printed copies of the 2023 Foundation Report for the ADSOEF Annual Meeting (Foundation Report) were distributed.

Chairman Sandy Royer called the meeting to order at 7:00 p.m. She welcomed all members and guests and introduced herself and the ADSOEF officers.

Joyce Jones-Weinkam, Gamma Xi, served as Parliamentarian for the meeting and read the Rules of Order. The Rules of Order were adopted without objection.

Agenda

The agenda was adopted without changes.

Approval of Minutes

The Minutes of the June 11, 2022, ADSOEF Annual Meeting were approved as electronically distributed and printed in the Foundation Report.

Treasurer's Report

Dr. Lois Harkins referred to the financial portions of the Foundation Report for members to review. She noted that the Treasurer's Report was dated from July 1, 2022, through January 31, 2023, which is just part of the fiscal year.

The details of the \$46,045.00 in expenditures were explained, which included approximately \$23,000.00 distributed for grants and projects.

The revenues from donations and investments were also reviewed. She thanked all individuals and chapters who have generously donated.

Dr. Harkins also shared that the ADSOEF portfolio currently has \$930,819.00 in investments. She pointed out items of interest in the report, such as the transfer of funds into short-term CDs, which currently earn more interest than the stock market, and into the checking account.

The Treasurer's Report will be filed for audit at the end of the fiscal year.

Committee Reports

Nominating Committee

Mary Kathryn (Kathy) McClendon explained the purpose of the committee and announced that seven candidates had submitted applications for the position of director. All ADSOEF members present were eligible to vote to elect five directors for the 2023-2025 term. Kathy thanked all the candidates who applied and were willing to be a director.

MOTION

The Nominating Committee moves that the following members of Alpha Delta State Ohio Educational Foundation be entered into nomination for the five (5) open positions of Director for the 2023-2025 term: Brenda Armstrong, Linda Diltz, Hannah Fairbanks, Jane Houser, Diana Kirkpatrick, Sue Loader, and Tammy Schroeder.

No second was needed since a committee made the motion. Sandy Royer asked for nominations from the floor. There were none, and she declared the nominations were closed. Sandy read the motion again and each nominee in attendance stood when her name was read. Voting was done by paper ballots, and a team of tellers counted the ballots. The tellers were Mary Kathryn McClendon, Dr. Lois Harkins, Betty Monahan, and JoAnn Krock.

Jane Brundige-Stein Scholarship

Dr. Norma Kirby described the history and resolution of the Stein case. She announced the news that on January 20, 2023, the amount of \$306,790.73 was received from the Dorman and Jane Brundige Stein estate. It was deposited and invested and will be used as specifically stated in the Stein's will to fund a Jane Brundige Stein Scholarship Fund in education or nursing for students from Marion, Ohio, at The Ohio State University, Marion Branch Campus. ADSOEF has established an application for this scholarship and a relationship with staff from OSU's Marion Branch.

Finance Committee

Donna Myers spoke for the Chairman, Millie Holzer, in her absence. She referred to the 2023-2024 budget and the Finance Report in the Foundation Report. She stated that the committee was excited to learn of the donation from the Stein Funds and increased the budget by about \$15,000.00 due to this gift, which will provide more funding for grants and scholarships. She acknowledged that the treasurer, Dr. Lois Harkins, demonstrated how to best invest these funds for maximum gain. She thanked the members of the committee.

Donor Relations

Sandy Royer gave the report in the absence of the Chairman, Debbie Frazier. Debbie said the job of the committee is to recognize and thank the generous donors. She wrote that it is an honor to send the tax letters and a pleasure to write the personal thank-you notes.

Educational Services Committee

Christine (Chris) Snoddy, Chairman, shared that the committee oversees three grant areas: the Individual/Classroom/Community Project Fund, the Leadership Development Fund, and the Lifelong Learning Fund. To date, three Individual/Classroom/Community Project grants have been awarded \$500.00 each, and the details were listed in the Foundation Report. No grants had been awarded from the Leadership Development Fund. One Lifelong Learning Fund grant was approved as submitted by Debby Canter for charter bus transportation during the June 2023 Biennial Seminar. Chris encouraged all to apply using the fillable applications found on the Foundation's website. They can be submitted at any time of the year.

Fundraising Committee

Beth Archer, Chairman, stated she was honored to serve as chairman. The campaign theme of *Open Your Heart for the Future of Education* was selected at the committee's first meeting, and Dr. Norma Kirby found the accompanying graphic for the theme. The goal was set at \$8,500 to celebrate the 85th Anniversary of DKG/OSO. Beth thanked those who had already donated and announced that as of March 31, 2023, a total of \$11,820.48 had been raised. She reminded everyone that there were more opportunities to give at the ticket auction and Birthday Luncheon during the OSO Convention weekend.

Marketing Committee

Dr. Norma Kirby, Chairman, encouraged everyone to read the committee's summary in the Foundation Report, to visit the website at adsoef.org, and to investigate all the resources for members and chapters on the website. She thanked the committee members.

Governance Committee

Karyn Kern-Lazear, Chairman, described the work of the committee, which is to review and revise the Bylaws and policies every year. She noted that the Bylaws have been revised and the changes were already posted on the website. She said the major revisions were to eliminate the provisions about staggering the terms of the Foundation Directors, since that process happened in 2019-2021. Currently, five of the ten Directors are elected each year for two-year terms. The committee has also been reviewing all the policies of the Foundation. Most of them did not need changes, except for minor edits. All these policies can be found on the website. She thanked the committee members for their hard work.

Liaison from OSO Scholarship Committee

Marilyn Slusser, OSO Scholarship Committee Chairman and Liaison to ADSOEF, reported that \$15,000.00 had been budgeted for the Esther H. Strickland student teaching grants for the 2023-24 school year. The committee evaluated 27 applications, and eleven recipients received these grants. In addition, three grants were funded at Miami University from the Ruth Grimes Scholarship since no OSO members applied for graduate study. Thanks to the Jane Brundige-Stein Scholarship, three students from Marion County also received grants at the OSO Marion Campus. This totaled seventeen student teaching grants awarded for the sum of \$24,300.00.

Marilyn reported that the amount budgeted for the A. Margaret Boyd Overseas Fellowship has been increased due to generous donations to ADSOEF. Brenda Rojas had received an extension for her fellowship and will be graduating on May 3, 2023, from The Ohio State University with her master's degree. Della Kartika-Sari from Indonesia, the current recipient, received an extension of \$5,000.00 to continue her studies at the University of Cincinnati in 2023-2024. Also, \$8,000.00 will be awarded for the next fellowship recipient.

Marilyn announced the grand total of funds awarded for the student teaching grants and A. Margaret Boyd Overseas Fellowships in 2023-2024 is \$37,300.00, which is the largest number of grants and money ever given.

Marilyn introduced Brenda Rojas and Della Kartika-Sari who both spoke. They shared their deep gratitude and appreciation for the funds, friendship, networking, support, and kindness they have received. Marilyn read the names of the 17 recipients of the student teaching grants.

Unfinished Business

None

New Business

Sandy Royer thanked all seven candidates who were willing to run for Director.

The election results were announced, and the new 2023-25 ADSOEF Board Directors are:

- Brenda Armstrong
- Linda Diltz
- Diana Kirkpatrick
- Sue Loader
- Tammy Schroeder

Sandy also recognized the outgoing Directors Karyn Kern-Lazear, Dr. Norma Kirby, Sandy Royer, and Marilyn Slusser since their terms end June 30, 2023. Their dedication, hard work, and many hours of service were commended.

Sandy thanked the webmaster, Eileen McNally, and the newsletter editor, Cathy Tenney.

The meeting was adjourned at 7:51 p.m.

Respectfully submitted,

Christine Snoddy, Secretary

Sandy Royer, Chairman

TREASURER'S REPORT: July 1, 2023 – March 31, 2024

The Treasurer's goals for this fiscal year were to:

- Maintain communication with US Bank in Logan, Ohio, Huntington Bank in Lancaster, Ohio, and Royal Bank of Canada in Austin, Texas.
- Continue partnership with Childress Accounting in The Plains, Ohio, formerly Smith and Barnes, for QuickBooks direction, clarification of 5% status, guidance for International Studies Recipient personal IRS issues, establishment of deadlines and responsibilities, and willingness to continue a lower fee.
- Arrange transactions of Dorman and Jane Brundige Stein donation.
- Facilitate payment for attorney services involved with Stein donation.
- Establish electronic payment for Excise Tax with Internal Revenue Service.
- Organize and institute financial transactions from a remote setting.
- Work with all committees to complete business transactions from a remote setting.
- Meet deadlines and needs of ADSOEF Finance Committee, chair, editor, and webmaster.
- Increase communication with ADSOEF donors and Fundraising Committee.
- Express sincere gratitude to OSO members and ADSOEF Directors for assistance and patience with donations and treasurer responsibilities.

Dr. Lois Harkins, Alpha Lambda, Treasurer

ADSOEF 2023-24 Committee Reports...a behind the scenes view

DONOR RELATIONS COMMITTEE

The privilege of the Donor Relations Committee is getting to hear from so many generous OSO individual members and chapters. For the calendar year January 1, 2023 through December 31, 2023, 255 contributions were received by ADSOEF. Tax letters were generated and mailed for the majority of these donations. Some were delivered via email. Personal thank you or acknowledgement notes were written and mailed. There were some contributions anonymously given. Many contributions were from individuals and many were from chapters. Some contributions were given in honor of or in memory of someone significant. Those honored were notified of the honor and the contributor. Family members were notified when a loved one was recognized in memory and who the contributor was as well.

Karen McFarland, Beta Rho; Julie Lombardo, Beta Rho; Diana Kirkpatrick, Alpha Delta, and Debra Frazier, Beta Rho, Chairman

EDUCATIONAL SERVICES COMMITTEE

The Educational Services Committee oversees awards in three areas:

Individual/Classroom/Community Project Fund, Leadership Development Fund, and Lifelong Learning Fund.

As of March 31, 2024, one application for a \$500.00 classroom project has been approved and awarded. \$4,000.00 is still available for applicants from the 2023-2024 budget.

This year's committee, three of whom are new to the committee, met in August 2023 for an orientation meeting, and are eager to receive, read, and consider applications for educational projects, leadership, and lifelong learning awards.

The three Individual/Classroom/Community Project Fund awards approved in 2022-2023 to the Girls Club Life Skills Project at Elm Street Elementary School in Painesville, the Beta Rho Little Free Libraries Project in Circleville, and the Inspiration Station Library Project in Norwalk have all completed their projects and submitted the required receipts, photographs, and newsletter articles.

Also, all the necessary receipts, pictures, and reports were submitted by Past OSO President, Debby Canter, for the Lifelong Learning Fund award for the 2023 Biennial Seminar, ***History in the Hills.***

This committee looks forward to having applications submitted for all three awards, so the funds that have been generously donated to fulfill the mission of ADSOEF can be used to “.... serve charitable purposes relating to professional and personal growth of educators and educational excellence.”

Applications can be submitted any time during the year.

Mary Burkhardt, Delta Kappa; Karen Dunn, Alpha Psi; JoAnn Krock, Zeta; Kathy McClendon, Zeta; Michelle Maniskas, Alpha Xi, OSO Liaison; and Chris Snoddy, Alpha Lambda, Chairman.

FINANCE COMMITTEE

The Finance Committee continues to carefully oversee the investments and funds. Changes in earnings, opportunities for giving, and new ideas for educational assistance are also considered.

Again, keeping in mind that a financial requirement of a Private Charitable Foundation is “a minimum of 5% of asset holdings are distributed each year,” the 2024-2025 Budget was prepared and approved. Lois Harkins, Treasurer, carefully monitors the Total Assets, as well as, the Income and Disbursements. Using the total assets of each month, she averaged the total assets for 2023. That average provides the number to use for setting the annual budget for ADSOEF.

Of course, a budget is only a guideline. If a request for an expense arises that is substantially more than the budgeted amount or that is not included in the budget, the request will be considered by the Finance Committee and brought before the Board of Directors for approval.

The various projects and activities of Delta Kappa Gamma/OSO/ADSOEF are funded with income from sound investments and generous donations.

Freda Cook, Beta; Dr. Lois Harkins, Alpha Lambda, ADSOEF Treasurer; Donna Myers, Kappa; Molly Tharp, Alpha Psi; and Millie Holzer, Beta Zeta, Chairman

FUNDRAISING COMMITTEE

The ADSOEF Fundraising Committee met weekly during the month of September 2023 to create and plan the fundraising campaign for 2023-2024. In recognition of the 86th anniversary of the founding of Ohio State Organization, \$8,600.00 was chosen as the goal for the year with the theme, ***Planting Seeds for the Future.***

In November, a mass fundraising mailing was sent to past donors informing them that two anonymous donors were providing matching funds up to \$1,000.00 each between National Philanthropy Day and Giving Tuesday. The response was overwhelming with \$5,850.83 donated during that time period, and a total of \$11,113.20 given from July 1, 2023 through to the end of

2023. Many thanks to the generous donors who have chosen to support the grants, fellowships, projects, and scholarships of ADSOEF/OSO.

An attractive and informative *ADSOEF Update* is sent monthly via email to chapter representatives to share with their members. Committee member, Holly Buente oversees the monthly update publication. Articles are posted in the *Foundation Matters* newsletter each month to report the fundraising progress being made. The 86th Birthday Luncheon, in the spring, will provide members with another excellent opportunity to support the programs of ADSOEF/OSO through their generous donations.

Joan Avery, Chi; Holly Buente, Gamma Pi; Nancy Russell, Beta Kappa, Linda Diltz, Beta Rho, Co-Chairman; and Barb Zirke, Alpha Psi, Co-Chairman.

MARKETING COMMITTEE

Through committee meetings, the Marketing Committee develops strategies to encourage member and recipient involvement.

Throughout this year, both paper and electronic documents were updated and are currently available on the ADSOEF website under *Resources for Chapters and Members*. The committee reviews the website and Facebook posts, and offers suggestions. The Marketing Committee manages the Facebook page, Alpha Delta State Ohio Educational Foundation, and encourages you to check it out. Currently, the committee is in the process of reviewing and updating the Marketing Guidelines and Responsibilities. We welcome your suggestions and input!

Brenda Armstrong, OSO State Member; Beth Bronkar, Beta Psi; Cathy Tenney, Beta Kappa; Katie Gantz, Gamma Phi, OSO liaison; and Diana Kirkpatrick, Alpha Delta, Board Chairman.

GOVERNANCE COMMITTEE

The Governance Committee is responsible for the ADSOEF official governing documents including the *Bylaws*, policies, procedures, and the *Handbook*. Governing documents enable the Board to operate with a deliberate system of principles, to guide decisions, and to achieve rational and consistent outcomes. According to a Board-approved schedule, governing documents are reviewed on an annual basis. To date through monthly meetings, the *Bylaws* and all existing policies have been reviewed and/or revised, presented to the Board of Directors, approved by the Board, and are posted on the website at adsoef.org. A Volunteer Policy has been developed, approved by the BOD, and is posted on the website. A Cybersecurity Policy is in the draft stage and should be completed by the end of the fiscal year. The Governance Committee is in the process of reviewing, revising and/or creating procedures to accompany all established policies.

ADSOEF *Bylaws* and policies address our mission and purposes, reflect our ethics and integrity, assign responsibilities, and inform current and future board directors, committee members, and ADSOEF members. In addition to the required annual review, *Bylaws* and policies are reviewed at the request of any Board Director, committee, or ADSOEF member. Please review the *Bylaws* and policies at adsoef.org, and contact the Board Chairman or the Governance Committee Chairman with questions and concerns. Your input is welcomed and valued by the Governance Committee and the Board of Directors.

Sue Loader, Alpha Psi; Sandy Royer, Delta Kappa; Tammy Schroeder, Beta Eta; Joyce Jones-Weinkam, Gamma Xi and Dr. Norma Kirby, Alpha Delta, Chairman.

NOMINATING COMMITTEE

Finding OSO/ADSOEF members who are willing to serve as a director for ADSOEF is the main responsibility of the Nominating Committee. This year we were successful in obtaining five candidates for the five Director positions. The names and information about each candidate were published in the March edition of *Foundation Matters*.

The committee also reviewed the Nominating Committee Policy and completed a revision of the Nominating Committee Procedures documents which were then approved by the Board.

Debby Canter, Delta Epsilon; Tammy Schroder, Beta Eta; Barbara Smith, Zeta; Nancy Waters, Alpha Psi; and Sue Loader, Alpha Psi, Chairman

SCHOLARSHIP LIAISON REPORTS

OHIO STATE ORGANIZATION SCHOLARSHIPS FUNDED BY ADSOEF

The OSO Scholarship Committee received approximately twenty-five (25) Esther H. Strickland Student Teaching Grant applications. The committee has read and ranked them using the rubric adopted by the OSO Scholarship Committee and the ADSOEF Board of Directors. The recipients will be revealed at the April 6, 2024, ADSOEF Annual Meeting.

Please continue to read our student teacher stories in *Foundation Matters*, as three of the recipients did half of their student teaching abroad. Their experiences are very interesting.

The donations, from all members, chapters and anonymous donors, allow this committee to fulfill the purposes of the ADSOEF.

Nicole Burley, Delta Kappa; Sue Loader, Alpha Psi; Judy McClanahan, Gamma Nu; and Marilyn Slusser, Delta Kapp, ADSOEF Liaison and OSO Scholarship Chairman.

ADSOEF GRANTS AND SCHOLARSHIPS

We are thrilled to report the Jane Brundige Stein Scholarship awarded its first student teaching scholarships to three (3) students residing in Marion County Ohio and attending the OSU Marion Branch of The Ohio State University. The committee looks forward to helping other students from this university each year.

The A. Margaret Boyd Fellowship Grant is always active. We have received six (6) dossiers for the 2024-25 school year, from the Fulbright Institute of International Education. The committee has read, ranked the dossiers and returned the scores to Fulbright. We received a new recipient Mukadas Tashieva from Kyrgyzstan. Mukadas is pursuing her Masters in Language Teaching at Kent State University. We continue to support Della Sari, from Indonesia at the University of Cincinnati on her Doctorate. We did congratulate and say good luck to Brenda Rojas, who graduated first in the class from The Ohio State University. Currently, Brenda is studying for her Doctorate at OSU.

ADSOEF wishes to thank all members, chapters and anonymous donors that have contributed to the ADSOEF, as this allows many to fulfill their educational journey.

Nicole Burley, Delta Kappa; Sue Loader, Alpha Psi; Judy McClanahan, Gamma Nu; and Marilyn Slusser, Delta Kappa, ADSOEF Liaison and OSO Scholarship Chairman.

RECIPIENTS OF ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION FUNDING

Esther H. Strickland Student Teaching Grant recipients:

2023-2024

Melinda Barman, Miami University
Delaney Barrett, Miami University
Madison Beadling, Kent State University
Makenzie Claypool, Miami University
Alisia Gerber, Kent State University
Jordan Hammond, Miami University
Makala Johnstone, Kent State University
Kyle Kaiser, The Ohio State University-Marion
Courtney Kidd, Miami University

Mackenzie May, Miami University
Mary McCauley, Miami University
Michaela Notte, Kent State University
Carissa Osborne, Miami University
Sydney Reynolds, Miami University
Gianna Schiavi, Kent State University
Kayla Wood, Miami University

2022-2023

Crystal Alstaetter, The Ohio State University-Lima
Audra Bernys, University of Cincinnati
Nicholas Detzel, Miami University
Evette Harrell, Miami University
Jael Jackson, The Ohio State University - Lima
Emily Lam, Wright State University
Courtney Mix, Miami University
Casey Quinn, Miami University

Melinda Smith, Bowling Green State University
Sarah Steele, University of Toledo
Kayla Taylor, Bowling Green State University
Madison Thompson, Miami University
Paige Washburn, Miami University
Macy Weinreich, Miami University
Olivia Yereen OH, Bowling Green State University

2018-2019

Cadelyn Bell, Ohio University, Zanesville
Whitney Bobo, Ohio University, Zanesville
Danielle Dunkle, Ohio University Zanesville
Amanda Fitz, Ohio University, Zanesville
Bailee Hosey, Ohio University, Zanesville
Halena King, University of Akron
Annika Lykins, Wright State University
Emily Mourer, Ohio University, Zanesville
Abby Wise, University of Akron
Vanessa Wooten, Ohio University, Zanesville

2020-2021

Megan Anderson, Wright State University
Emma Campbell, Miami University
Emily Crowe, Miami University
Daulton Faulder, The Ohio State University-Lima
Haley Garland, The Ohio State University-Lima
Chance Goolie, Ohio University-Eastern Campus
Mary Piper, Miami University
Sarah Redett, Miami University
Ryan Turrieta, Miami University
Brynn Valentine, Ohio University-Zanesville

2019-2020

Jaimie Arnold, Wright State University
Matthew Blum, Ohio University, Athens
Daniel Boecker, The Ohio State University, Lima
Marie Dean, Bowling Green State University
Stephanie Hunt, The University of Toledo
Keri Mootz, Ohio University, Southern
Dominique S. Shiple, The University of Toledo
Trevor Shockey, Wright State University
Gregory Silcox, Bowling Green State University
Amy Silvestri, The University of Toledo

2021-2022

Brooke Anderson, Shawnee State University
Brooke Carver, Wright State University
Carley Derexson, Ohio University, Lancaster
Alisha Jenkins, The Ohio State University, Newark
Ross Kaufman, The Ohio State University, Lima
Samantha Lowe, Ohio University, Lancaster
Megan Manning, Wright State University
Ashlynn Moore, Wright State University
Michael Sweeney, Ohio University
Mya Violet, Wright State University

Annie Webb Blanton Scholarships recipients:

2019

Tracie Cowgill, Alpha Xi Chapter, Concordia University, Chicago
Dr. Katharine Delevan, Gamma Theta Chapter, Harvard University

A. M. Boyd International Study Fellowship recipients:

2018-2019

Nominchimeg Davannyam from Mongolia, studying at Kent State University

2020-2021

Gunel Alasgarova from Azerbaijan, studying at Kent State University

2021-2022

Brenda Rojas from Paraguay, studying at The Ohio State University

2022-2023

Della Sari from Indonesia, studying at the University of Cincinnati

2023-2024

Mukadas Tashieva from Kyrgyzstan, studying at Kent State University

Leadership Fund recipients:

2020- 2021

Meier Bauer, Gamma Phi, Governance and Compliance for Nonprofits Workshop
Diana Haskell, Gamma Phi, Governance and Compliance for Nonprofits Workshop”
Diana Haskell, Gamma Phi, Mastering QuickBooks: A How-to Clinic for Nonprofit Bookkeepers

Lifelong Learning Fund recipients:

2020-2021

Leila Kubesch - “Belong, Believe, and Build” Biennial Seminar Presenter - delivered via Zoom
Kim Lewis, Delta Epsilon - for two graduate courses investigating a possible master’s degree in the Director of Pupil Personnel Program at the University of the Columbians

2022-2023

Debby Canter, OSO State Organization - *History in the Hills* Biennial Seminar

2023-2024

None as of March 31, 2024.

Individual/Classroom/Community Project Fund recipients:

2019- 2020

Read to Succeed: Summer Reading Retention - Sue Thuma, Alpha Psi, Project Leader

2021-2022

Wayne Trace Robotics Engineering and Marketing Club Competition - Angie Stokes, Beta Eta, Project Leader

Wiggling Into Reading - Tracie Cowgill, Alpha Xi, Project Leader
Sensory Room for Students - Linda Graves, Delta Mu, Project Leader

Interactive Sound Wall - Pamela Todd, Alpha Iota, Project Leader

Building STEM Skills by Building Circuits - Kristen Stimmel, Alpha Xi, Project Leader for the Hocking Hills Children's Museum

2022-2023

Elm Street Elementary Girls Club Life Skills Project - Hannah Fairbanks, Gamma Theta, Project Leader

2023-2024

Julie Lombardo, Beta Rho for Monica Lombardo Todisco – Media Arts Equipment Project

DONORS

Individual, Chapter, In Honor of and In Memory of
January 1, 2023 through December 31, 2023

INDIVIDUAL DONORS

Alice Harker	Claudia Grimes	Kathleen O'Malley
Alice Penrose	Claudia Stephens	Katie Gantz
Ann Todd	Cynthia Kleman	Laura Haynes
Annie Roegner	Danielle Yvette Kirksey	Lexa Freshly
Anonymous	Deborah Canter	Linda Diltz
Anonymous	Deborah VanArsdale	Linda Eggan
Anonymous	Debra Frazier	Linda Falatic
Anonymous	Diana Kirkpatrick	Linda Graves
Anonymous	Diana Klenk	Linda Harrison
Anonymous	Donna DeWitt	Linda Lawwill
Anonymous	Donna Mae Myers	Linda Lipp
Anonymous	Dr. Lois Harkins	Linda Porteus
Anonymous	Dr. Molly Helmlinger	Linda Shaw
Anonymous	Dr. Norma Kirby	Linda Stillman
Anonymous	Dr. Ruth Brooks	Lona Bowman
Anonymous	Eileen McNally	Lora Freshly
Anonymous	Ellen Andrews	Loretta Smith
Anonymous	Ellen Harrison	Lori Paul
Anonymous	Ellen Smith	Louise H. Bennet
Anonymous	Freda Cook	Marcia Smith
Anonymous	Hannah Fairbanks	Margaret Murph
Anonymous	Helenlu Morgan	Marilyn Bauer
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Barbara L. Murray	Jay Bahnsen	Mary Ellen Hall
Barbara S. Cleveland	Jackie Thase-Burch	Mary Kathryn McClendon
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Barbara Taraska	Jane Houser	Melody Newman
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Bettilu Fraas	Jeanne Bennett	Nadine S. Steele
Betty Monohan	Jennifer Conkle	Nancy Glasgow
Bev Babbert	Jere K. Gardner	Nancy Miller
Bonnie Lillibridge	Joan Avery	Nancy Perkins
Brenda Armstrong	Joan Bostelman	Nancy Russell
Carmel Jenkins	JoAnn Krock	Nancy Wood
Carolgene Schortgen	Joyce Jones Weinkam	Pam Feick
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Chris Snoddy	Karen Dauer	Peggy Lester
Cindy Lawyer	Karyn Lazear	Rebecca Doak
Cindy Speakman	Katherine K. Wheeler	Rita Francis

Rita Painter
Roberta Leach
Ruth Hogsten
Sandra Procaccio
Sandra Woodyard
Sandy Clawson
Sandy Royer
Sherry Grimes
Stacie Ishmael
Susan Brueggmeier
Sue Loader
Sue Samoviski
Tamara Schroeder
Terri Duesing
Tiffany Shaw
Trudy Cultice
Virginia Koch

Chapters

Alpha Delta	Chi
Alpha Eta	Gamma Xi
Alpha Gamma	Delta Chi
Alpha Lambda	Delta Delta
Alpha Phi	Delta Mu
Alpha Psi	Delta Phi
Alpha Sigma	Gamma Eta
Alpha Upsilon	Gamma Iota
Beta	Gamma Lambda
Beta Chi	Gamma Mu
Beta Eta	Gamma Iota
Beta Lambda	Gamma Phi
Beta Nu	Gamma Pi
Beta Pi	Gamma Tau
Beta Psi	Gamma Theta
Beta Rho	Kappa
Beta Upsilon	Omicron
Beta Zeta	Zeta

In Honor of

Ann Todd: honor of Barbara Smith and Debby Canter
Anonymous: honor of Beth Archer
Anonymous: honor of Ellen J. Andrews
Anonymous: honor of members of Zeta Chapter
Anonymous: honor of Pat Eshbaugh
Barbara Ade: honor of Barbara Murray and Melissa Hackett
Barbara L. Murray: honor of Barbara Ade
Barbara L. Murray: honor of Holly Buente
Barbara Smith: honor of M. Katheryn McClendon
Belinda Dixon: honor of Debby Canter
Beta Pi: honor and memory of all Chapter members
Bettilu Fraas: honor of Vickie Groenke
Bev Babbert: honor of Delta Theta Sisters
Carmel Jenkins: honor of Christy Murray Stewart
Cathy Tenney: honor of Dr. Norma Kirby
Cathy Tenney: honor of Eileen McNally, Dr. Norma Kirby, Debby Canter and Katie Gantz, chair of OSO Communications/Marketing
Cathy Tenney: honor of Sandy Royer and Dr. Lois Harkins
Chi and Gamma Xi Chapters: honor of Dr. Norma Kirby
Cindy Speakman: honor of Gamma Phi Sisters
Claudia Grimes: honor of Mary Vasek
Deborah Canter: honor of Ann Todd
Diana Klenk: honor of all members of Gamma Phi
Donna Mae Myers: honor of Kathy Lundy
Donna Myers: honor of Jodine McKinley
Dr. Lois Harkins: honor of ADSOEF Board of Directors
Dr. Lois Harkins: honor of Diana Kirkpatrick, Cathy Tenney
Dr. Lois Harkins: honor of Dr. Norma Kirby, Sandy Royer, Marilyn Slusser and Karyn Lazear
Dr. Lois Harkins: honor of Shelia Theiss
Dr. Norma Kirby: honor of Barbara J. Smith
Dr. Norma Kirby: honor of Dr. Lois and Mr. Bill Harkins
Dr. Norma Kirby: honor of Dr. Lois Harkins
Dr. Norma Kirby: honor of Dr. Peggy Snow
Dr. Norma Kirby: honor of newly elected ADSOEF directors
Dr. Norma Kirby: honor of Pam Feick
Dr. Norma Kirby: honor of Sandy Royer, Karyn Kern Lazear and Marilyn Slusser
Eileen McNally: honor of Cathy Tenney
Hannah Fairbanks: honor of Paulette Howell and Carol Ford
Holly Buente: honor of Barbara Ade
Holly Buente: honor of Melissa Hackett
Jackie Thase-Burch: honor of Judy Logan, Karen Johnson, Jo Hermes and Rebecca Doak
Jane E. Meese: honor of Alpha Xi officers
Jane E. Meese: honor of new ADSOEF Board of Directors
JoAnn Krock: honor of Dottie Pickering
Joyce Jones Weinkam: honor of Debby Canter
Julie Bains: honor of Sandy Royer
Katie Gantz: honor of Eileen McNally
Linda Diltz: honor of Diana Kirkpatrick

Linda Diltz: honor of Beta Rho Chapter members
Linda Harrison: honor of Mattie Fair
Linda Stillman: honor of Virginia Koch
Lori Paul: honor of Donna Myers
Marcia Smith: honor of Alice Harker
Marlene Vorherr: honor of Jane Pittman
Mary Kathryn McClendon: honor of Barbara J. Smith
Mary Kathryn McClendon: honor of Sandy Royer and ADSOEF Board of Directors
Molly Tharp: honor of Beth Archer
Nancy Wood: honor of Chris Snoddy
Nancy Wood: honor of Dr. Lois Harkins
Peggy Lester: honor Nancy Davis
Rebecca Doak: honor of Alpha Upsilon member, Nancy McAlexander, Marilyn Sims,
and Barb Werth
Sandy Royer: honor of ADSOEF Board of Directors
Sue Loader: honor of friendships made through DKG
Sue Loader: honor of Sandy Royer, Karyn Kern Lazear and Marilyn Slusser
Susan Brueggmeier: honor of Delta Iota Chapter

In Memory of

Alice Penrose: memory of Florence L. Woodward
Alpha Psi: memory of Ruth Shaner
Beta Rho Chapter: memory of Carol Mader, Pat Beck, Karen Bensonhaver
Beth Archer: memory of Ruth Sharrer
Bonnie Lillibridge: memory of Florence Woodward
Cathy Tenney: memory of Bill Harkins
Cathy Tenney: memory of Esther Zellers
Cathy Tenney: memory of Ron Goodfellow
Deborah VanArsdale: memory of Fran Kachman
Delta Phi: memory of Jan Thomas
Donna De Witt: memory of Ann Sickels
Dr. Lois Harkins: memory of Florence Woodward
Dr. Molly Helmlinger: memory of Marilyn Williamson
Dr. Norma Kirby: memory of Arlene C. Ackerman
Dr. Norma Kirby: memory of Esther Zellers
Dr. Norma Kirby: memory of Florence L Woodward
Dr. Norma Kirby: Memory of Geraldine Roberts
Dr. Norma Kirby: memory of Marianne Kirby
Eileen McNally: memory of Esther Zellers
Gamma Lambda: memory of Leah Joanne Mazzaferro
Hannah Fairbanks: memory Carol and Paulette
Jan Schoellman: memory of Candace Meadors
Jane E. Meese: memory of John Meese
Jay Bahnsen: memory of Patricia Stetson
Jeanne A. Schaad: memory of Joann Holder
Joan Avery: memory of Barbara Blair
Joan Bostelman: memory of Winifred Jacoby, Arlene Akerman and Patricia
Eshbaugh
Judy Valentine: memory of Eileen Young
Judy Valentine: memory of Eileen Young

Katie Gantz: memory of Esther Zellers
Katie Gantz: memory of Marilyn Williamson
Katie Gantz: memory of Nancy Arulf
Linda Diltz: memory of Karen Bensonhaver
Loretta Smith: memory of Wilma Van Camp
Louise H. Bennet: memory of Florence L. Woodward
Margaret Murph: memory of Gloria A. Barnes
Mary Kathryn McClendon: memory of Evelyn Ferguson
Mary Kathryn McClendon: memory of Florence Woodward
Omicron Chapter: memory of Joann Holder
OSO Expansion Committee: memory of Esther Zellers
Patricia Beathard: memory of Carol Mader
Patricia Cermak: memory of Florence L. Woodward
Patricia Cermak: memory of Florence Woodward
Ruth Hogsten: memory of Arlene Akerman
Sandy Royer: memory of Esther Zellers
Tiffany Shaw: memory of Jan Thomas
Virginia Koch: memory of Florence L. Woodward

Other

DKG Ohio State Organization
OSO Expansion Committee

ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION TREASURER'S ANNUAL REPORT

July 1, 2023 through **January 31, 2024**

REVENUE

Public Support

- * ALL Direct Public Support Donations
Planting Seeds for the Future

TOTAL: \$11,383.20

Funds supported: Unrestricted (76%), Strickland, Educational Services, Stein, Leadership, Woodward, Scholarship, and Lifelong Learning

Investments

- * Interest, Dividends, Other-\$9038
- * Change in Market Value-\$2064
- * Advisor Fee- **-\$2,451**

INVESTMENT TOTAL: \$8,651

PORTFOLIO

- * Royal Bank of Canada-\$541,524.02
- * Huntington Bank CD-\$318,958.59
- * Huntington Checking-\$19,495.49
- * US Bank CD-\$30,000.00
- * US Bank Checking-\$21,709.01

TOTAL: \$931,687.11

(Compared to 01/31/2023: \$930,819.00)

ITEM OF INTEREST

Needed to withdraw from RBC's International Fund (\$6,500) and Student Teaching (\$12,300) in mid-November to meet Spring Semester obligations. Our checking account did not have enough funds to cover the balance. Also, my calendar was unpredictable.

EXPENDITURES

Grants

- * A. Margaret Boyd-Cincinnati & Kent-\$13,000 (2)
- * Esther H. Strickland-Bowling Green, Cincinnati, Ohio, & Wright State-\$16,200 (12)
- * Jane Brundrige Stein-\$6000 (3)

Projects

- * To Be Announced

TOTAL: \$35,200

(Compared to 01/31/2023: \$23,000)

Business

- * AIM Insurance-Liability-\$365
- * Contracts-Editor & Webmaster-\$1000
- * CPA-\$765
- * Ohio Attorney General Registration-\$200
- * IRS-Excise Tax-\$173
- * Technology-Zoom, Constant Contact, & Weebly (1)-\$356

Board and Committee

- * Postage-Treasurer & Governance-\$62
- * Mileage-Material Exchange, & Meetings-\$231
- * Fundraising-Printing, Mileage, & Postage-\$411

TOTAL: \$3,563

(Compared to 01/31/2023: \$23,045)

Expenditures Grand Total: \$38,763

(Compared to 01/31/2023: \$46,045)

BUDGET FOR ADSoEF 2024-2025

Revenue Items	Amount
OSO Chapter Contributions	680
Direct Appeal	16,200
Individual Contributions	3,000
RBC Dividends and Interest	12,000
Transfer OSO Scholarship	900
Interest-Huntington (Stein Only-\$12,000) and US Bank (\$1,200)	1,200
Convention Fundraiser	2,000
RBC Withdrawals for Boyd	13,000
Estimated Checking Account Balance for EHS Student Teaching Grant	5,000
Transfer from Huntington to fund Stein Grants	5,000
TOTAL	\$58,980

Disbursement Items	Amount
Accounting Fees (CPA)	765
Accounting Fees A. Margaret Boyd IRS--POSSIBILITY	150
Insurance (Liability and Bond)	365
Ohio Charitable Registration	200
Webmaster and Editor Contracts	1,000
Ohio History Connection Donation	50
Postage-Donor Relations, Treasurer	800
Printing, Paper, Ink Cartridges- Secretary, Donor Relations, Treasurer, Annual Meeting	1,500
QuickBooks and IT Support	150
Mileage-Annual Meeting; Material Exchange; Banks; Executive Board	750
Zoom, Weebly (2), Constant Contact	500
Donor Relations	500
Marketing	500
Fundraising	1,500
Educational Projects	2,500
Leadership Development	1,000
Lifelong Learning/Biennial Seminar	2,000
Federal Excise Taxes	200
Annual Meeting-Lodging, Mileage, Recipient Expenses	3,000
Governance	500
A.M. Boyd International Studies	13,000
Blanton Scholarship	1,500
Woodward Scholarship	2,500
Jane Brundige Stein Scholarships	5,000
Strickland Student Teaching Grants	19,000
Huntington Safe Deposit Box	50
TOTAL	\$58,980



Alpha Delta State Ohio Educational Foundation

At a Glance

*Alpha Delta State Ohio Educational Foundation
has served members and nonmembers through the following programs:*

Student Teaching Grants (Esther H. Strickland) assisted 72 students at Ohio public universities during their student teaching semester.

International Study Fellowships (A. Margaret Boyd) supported 5 students from foreign countries who completed advanced degrees at a university in Ohio.

Leadership Development (Leadership Memorial) provided support to 3 members for expenses related to the development of leadership knowledge, skills or experiences, and for expenses specifically related to non-profit leadership or board participation.

Educational Projects (Individual/Classroom/Community) provided up to \$500.00 in financial support to 10 educators for educational projects for targeted learners in non-profit settings and community-based projects.

Lifelong Learning provided support to 1 member for expenses for ongoing, voluntary and self-motivated pursuit of knowledge for either personal or professional reasons, and provided funds for the Biennial Seminar presenter in 2021. Plus, in June 2023, provided funds for the *History in the Hills* Biennial Seminar.

Scholarships are available for members through the Margaret L. White Scholarship at The Ohio State University, the Ruth Grimes Scholarship at Miami University, the Florence L. Woodward Scholarship at Kent State University, Jane Brundige Stein Scholarship/Grant at The Ohio State University, Marion Branch and the Annie Webb Blanton Scholarship at any accredited university. Two Annie Webb Blanton scholarships and four Jane Brundige Stein Student Teaching Grant have been awarded.

ADSOEF is an all-volunteer 501(c)3 private charity that is managed by 10 elected directors.

All members of Ohio State Organization of Delta Kappa Gamma are also members of ADSOEF. No membership fee is required by the Foundation.

***Thank you for your support for the professional and
personal growth of educators and educational
excellence!***

Numbers are reported for the period July 1, 2017 through as of March 31, 2024

www.adsoef.org