

ALPHA DELTA STATE



OHIO

EDUCATIONAL
FOUNDATION

**2023 Foundation Report
ADSOEF Annual Meeting
April 14, 2023**

ADSOEF BOARD OF DIRECTORS

Holly Buente, Gamma Pi, October 2022-2024
Director, Marketing Committee

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

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

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

Dr. Norma Kirby, Alpha Delta, 2021-2023
Marketing Committee Chairman

Karyn Kern-Lazear, Gamma Phi, 2019-2023
Governance Committee Chairman
Nominating Committee Chairman

Sue Loader, Alpha Psi, July 2022-2023
Director, Governance Committee

Sandy Royer, Delta Kappa, 2019-2023
Board Chairman

Marilyn Slusser, Delta Kappa, 2021-2023
Board Vice Chairman, OSO Scholarship
Committee Chairman

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

Debby Canter, Delta Epsilon, 2021-2023
OSO President, Ex-Officio Member

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

FOUNDATION 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 Foundation. Subsequently the A. Margaret Boyd Overseas Foundation organized in 1981 was renamed Alpha Delta State Ohio Educational Foundation.

Alpha Delta State Ohio Educational Foundation is recognized as a non-profit 501(c)(3) private charity that began operation July 1, 2017. The Foundation 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. 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 MESSAGE FROM OUR CHAIRMAN

Alpha Delta State Ohio Educational Foundation (ADSOEF) continues its mission to support deserving educators and promote excellence in education. This Educational Foundation is productive because of our members! You serve as chapter representatives, directors, and on committees, giving of your time and talents. Thank you for opening your heart for the future of education. When asked, you gave gifts exceeding the \$8,500.00 goal set by the Fundraising Committee, and honored our 85th year of OSO DKG. From student teacher grants to international study fellowships to individual classroom or community project funding, many deserving people have benefitted from the generosity of our contributors. You helped make a difference in the lives of educators, children, and communities. We are seen as a worthy cause for both contributors' dollars and for the support we offer our beneficiaries. ADSOEF had a great year — thank you for making that happen!

A major gift from Dorman and Jane Brundige Stein's estate arrived in late January. The Jane Brundige Stein fund has been established and will provide scholarships and grants for Marion County students in education and/or nursing at the Ohio State University Marion Branch. We are grateful for the opportunity from the support of the Stein bequest to assist more deserving students.

Please visit adsoef.org for information, read *Foundation Matters* published on the fifteenth of each month, and like our Facebook page. ADSOEF Directors encourage your continued participation, value your support, and welcome your input and ideas.

Sincerely,
Sandy Royer

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
Dublin Embassy Suites
April 14, 2023
7:00 – 8:00 P.M.**

Call to Order and Meeting Guidelines	Sandy Royer, Chairman
Approval of Minutes	Christine (Chris) Snoddy, Secretary
Treasurer's Report	Dr. Lois Harkins, Treasurer
Election of Directors, Nominating Committee	Mary Kathryn McClendon
Good News: Jane Brundige Stein Scholarship	Dr. Norma Kirby
Committee Reports	
Finance	Donna Myers
Donor Relations	Debra Frazier, Chairman
Educational Services	Christine (Chris) Snoddy, Chairman
Fundraising	Beth Archer, Chairman
Marketing	Dr. Norma Kirby, Chairman
Governance	Karyn Kern-Lazear, Chairman
Fellowships and Grants	Marilyn Slusser, Liaison to OSO Scholarship Committee
Unfinished Business	
New Business	
Announcements	
Adjournment	Sandy Royer, Chairman

Joyce Jones 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 for supporting ADSOEF!



**ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION
2022 ANNUAL MEETING
MINUTES
June 11, 2022
Dublin Embassy Suites**

Approximately ninety-nine members were present for the 2022 Annual Meeting.

Chairman Dr. Norma Kirby called the meeting to order at 10:34 a.m.

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

Approval of Minutes

The Minutes of the 2021 ADSOEF Annual Meeting were approved as electronically distributed.

Treasurer's Report

Dr. Lois Harkins referred to the financial portion of the Annual Meeting Report for members to review. It was noted that a total of approximately \$19,000 was distributed for projects and programs.

It was reported that finances are in very good order. The CPA was hired for a fee of \$750. A better understanding of how to use the distribution of monies formula required by the IRS was explained.

Dr. Harkins also shared that various contributions with touching tributes honoring women in education were received.

The Treasurer's Report was filed for audit.

Committee Reports

Millie Holzer, Finance Committee Chairman, commended Dr. Lois Harkins for her detailed work.

Sandy Royer, Fundraising Committee Chairman, reminded attendees of the traditional luncheon giving opportunity. As of June 9, 2022, a total of \$11,790.83 had been raised during this year's fundraising campaign.

Jackie Thase-Burch, Marketing Committee Chairman, referred to the Annual Meeting Report and reminded every one of the Foundation's electronic presence on Facebook and the newly added QR code on documents for donations.

Dr. Norma Kirby referred to the Annual Meeting Report and recapped the Donor Relations Committee work chaired by Debra Frazier.

Chris Snoddy, Educational Services Committee Chairman, shared that there were grants available for Leadership, Lifelong Learning, and Individual/Classroom/Community Projects. To date, five Individual/Classroom/Community Project grants have been awarded. Two grants from the Lifelong Learning Fund have been given. The grant period in this report ran from June 2021 to June 2022. She encouraged everyone to apply.

Marilyn Slusser, OSO Scholarship Committee Liaison, reported that there were fifteen Esther H. Strickland student teaching grants for the 2022-23 school year, the most ever awarded.

Marilyn Slusser introduced the A. Margaret Boyd Overseas Fellowship recipients, Gunel Alasgrova, Kent State University graduate; and Brenda Rojas, Ohio State University student and recipient of a fellowship extension. Both recipients spoke of their gratitude for the fellowships and the love and support shown to them by OSO/DKG members.

In mid-July Della Kartika-Sari from Indonesia, current A. Margaret Boyd Fellowship recipient, will begin her studies at the University of Cincinnati.

Karyn Kern-Lazear, Governance Committee Chairman, reported that the Bylaws are up-to-date. Beginning in July, the committee will be reviewing the ADSOEF Policies and Procedures to ensure they meet the needs of the organization.

Karyn Kern-Lazear, Nominating Committee Chairman, reported that the committee will begin work in August to secure nominations for Board of Director members to fill vacancies including the vacancies of two directors who are term limited. Please contact Karen Kern-Lazear with names of potential candidates.

Unfinished Business

None

New Business

Carol Dunlap, Alpha Eta, won the ADSOEF newsletter naming contest. The newsletter will be titled *Foundation Matters* and is distributed electronically on the 15th of each month.

Dr. Kirby thanked Director Jackie Thase-Burch, 2017-22, for her service as Secretary, Marketing Committee Chairman and Fundraising Committee member, as she steps down from her post. Sue Loader, Alpha Psi, was appointed to complete the 2022-23 term.

The 2022-23 ADSOEF Board officers are:

Sandy Royer, Delta Kappa, Chairman
Marilyn Slusser, Delta Kappa, Vice-Chairman
Chris Snoddy, Alpha Lambda, Secretary
Dr. Lois Harkins, Alpha Lambda, Treasurer

Beth Archer, 2009-11 OSO President, thanked Dr. Norma Kirby for her work and commended the work of all Foundation directors and volunteers.

The meeting adjourned at 11:19 a.m.

Respectively Submitted,

Jackie Thase-Burch, Secretary

Dr. Norma Kirby, Chairman

TREASURER'S REPORT 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 COMMITTEE REPORTS July 1, 2022, through the Present

DONOR RELATIONS COMMITTEE

For the calendar year, January 1, 2022, through December 31, 2022, 188 donations were received by ADSOEF. Tax letters were generated and mailed for most of these donations. Some were delivered via email. Personal thank you or acknowledgement notes were written and mailed. Some donations were anonymously given. Many were from individuals as well as many from chapters. Some donations were given in honor of or in memory of someone special. Those who were honored received notes, as well as the family of those remembered in memory.

Debra Frazier, Beta Rho, Chairman; Mary Ellen Hall, Beta Lambda; Diana Kirkpatrick, Alpha Delta; Karen McFarland, Beta Rho

EDUCATIONAL SERVICES COMMITTEE

This committee oversees awards in three areas: **Individual/Classroom/Community Project Fund, Leadership Development Fund, and Lifelong Learning Fund.**

One **Individual/Classroom/Community Fund** award was approved this year. An award was given to the Girls Club Life Skills Project at Elm Street Elementary School in the Painesville City Schools, as submitted by Hannah Fairbanks, Gamma Theta. Two teachers at the school started a Girls Club for 4th and 5th graders. They will teach life skills with purchased supplies. The goal is to increase the girls' practical skills, their self-esteem, and their ability to help their community.

A **Lifelong Learning** award was provided for the 2023 Biennial Seminar, History in the Hills. OSO President Debby Canter is coordinating the event, and funds will provide a bus for transportation to the various tour locations in Gallia and Jackson Counties.

This committee's members look forward to having more applications submitted for all three awards, to fulfill the mission of ADSOEF to "... serve charitable purposes relating to professional and personal growth of educators and educational excellence." Committee members can assist you in applying. Applications may be submitted at any time during the year.

Chris Snoddy, Alpha Lambda, Chairman; Mary Burkhardt, Delta Kappa; Karen Dunn, Alpha Psi; Melodie McGee, Gamma Nu; Jane Morner, Alpha Delta; Pam Todd, Alpha Iota.

FINANCE COMMITTEE

The Finance Committee knows first hand the meaning of lifelong learning! We see changes in earnings, opportunities for giving, and new ideas for educational assistance.

Investments for the 2022-2023 fiscal year declined. However, we found a silver lining behind the cloud! We received a very generous donation from the will of Dorman and Jane Brundige Stein, a loyal Delta Kappa Gamma member. The investment of these funds will provide revenue for grants and scholarships at the Marion Branch of The Ohio State University for students in education and nursing.

Keeping in mind that a financial requirement of a Private Charitable Foundation is “a minimum of 5% of asset holdings are distributed each year,” we prepared the 2023-2024 Budget. ADSOEF 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 2022. That gave the committee a number to use for setting a 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 before approval by the Board.

We continue to support Purposes 3, 5, and 6 of The Delta Kappa Gamma Society International with income from sound investments and generous donations.

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

FUNDRAISING COMMITTEE

Raising money for the work of the Foundation is, of course, the biggest responsibility of the ADSOEF Fundraising Committee. Our hard-working team believes it's necessary to keep members informed about the program service opportunities offered. Hearing the stories of grant recipients whether in the newsletter or in person at state meetings is also very important. The knowledge, enthusiasm, and pride created by our reports at meetings, regular mailings, articles in the newsletter *Foundation Matters*, the website, or planned events like the Ticket Auction help grow our Delta Kappa Gamma family of patrons.

Our 2022-2023 Fundraising Committee wants to say a special thank you to every individual and chapter that have donated to ADSOEF this year. Since our Ohio State Organization is celebrating the 85th Anniversary of its founding back in 1938, a goal of \$8500.00 was selected for our campaign, **Open Your Heart for the Future of Education**. Thanks to generous donors we surpassed this goal, and with activities at the State Convention the total will climb higher.

Beth Archer, Alpha Psi, Chairman; Diane Brogan-Adams, Delta Kappa; Jackie Thase-Burch, Alpha Upsilon; Debbie Van Arsdale, Mu; Barb Zirke, Alpha Psi

MARKETING COMMITTEE

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

Throughout the year, both paper and electronic documents including *At A Glance*, the trifold brochure, the donation card, and *How Can I Help?/How Can It Support Me?* were updated, include a QR code, and are available on the ADSEOF website under Resources for Chapters and Members. The Committee regularly reviews the website, Facebook posts, and *Foundation Matters* 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 working on short videos to promote ADSOEF, articles for chapter newsletters, a FAQ section for the website, and ideas to promote the current fundraising campaign - *Open Your Heart for Education*. We welcome your suggestions and input!

Dr. Norma Kirby, Alpha Delta, Chairman; Holly Buente, Gamma Pi; Rebecca (Becky) Doak, Alpha Upsilon; Katie Gantz, Gamma Phi; and Sandy Royer, Delta Kappa, ad-hoc member

GOVERNANCE COMMITTEE

The Governance Committee will be completing its review of the Bylaws and ADSOEF policies by June 30, 2023, as this review is required by the Bylaws. Changes will be reported to the membership in the ADSOEF newsletter. Specific Articles and Sections of the Bylaws that are revised will be listed as well as the policies that were also changed. The changes/revisions will be printed in the Official Documents section on the ADSOEF web page but may not be posted prior to August 1, 2023.

Karyn Kern-Lazear, Gamma Phi, Chairman; Dr. Norma Kirby, Alpha Delta; Sue Loader, Alpha Psi; M. Kathryn McClendon, Zeta; Joyce Jones Weinkam, Gamma Xi

NOMINATING COMMITTEE

The first yearly election of five (5) Directors will happen at the Alpha Delta State Ohio Educational Foundation's (ADSOEF) annual meeting in April 2023 during the OSO convention. This year's ballot will have seven (7) candidates, with possible nominations from the floor. The five (5) candidates receiving the most votes are elected to the Board of Directors. The names of and information about each candidate will be published in a separate publication. Your participation in this portion of the Annual Meeting is important to the continuing growth of ADSOEF.

Karyn Kern-Lazear, Gamma Phi, Chairman; Kim Lewis, Delta Upsilon; Betty Monahan, Beta Lambda; M. Kathryn McClendon, Zeta; Chris Snoddy, Alpha Lambda

SCHOLARSHIP LIAISON REPORTS

OHIO STATE ORGANIZATION SCHOLARSHIPS FUNDED BY ADSOEF

The OSO Scholarship Committee received approximately thirty (30) Esther H. Strickland Student Teaching Grant applications. After reading and ranking the applications the Committee decided, in conjunction with Miami University, to offer fifteen grants ranging from \$2,000.00 to \$1,100.00. The Committee selected five (5) to be awarded by Miami University through the Esther H. Strickland Student Teaching Grant in memory of Ruth Grimes, and the other ten (10) would be funded through ADSOEF. Each of these recipients is very grateful for the help given by OSO through the Foundation.

Throughout the year, please read these student teachers' stories in the *Foundation Matters* newsletter.

Thank you to all members, chapters, and anonymous donors that have contributed to the Foundation allowing OSO to grant these students help in the pursuit of their education.

Respectfully submitted, Marilyn Slusser, Delta Kappa, ADSOEF Liaison, OSO Scholarship Chairman

ADSOEF GRANTS AND SCHOLARSHIPS

ADSOEF is very thankful to all members and chapters for their contributions to the Foundation, as this allows the Foundation to fulfill one of its biggest goals.

The A. Margaret Boyd Fellowship Grant is always very active. We received seven dossiers from Fulbright Institute of International Education and received a new recipient, Della Sari, from Indonesia. Della is attending the University of Cincinnati pursuing her Doctorate. We continue to support Brenda Rojas, Paraguay, at The Ohio State University, and we did congratulate and bid farewell to Gunel Alasgarova, Azerbaijan, as she completed her Master's Degree at Kent State University. Meeting and realizing the sacrifices these women make to accomplish their goals in education is truly amazing.

We are happy to report that ADSOEF helped to fund ten (10) Esther H. Strickland Student Teaching Grants for OSO.

ADSOEF is thrilled to support these grants and fellowships. Again, thank you to all contributors.

Respectfully submitted, Marilyn Slusser, Delta Kappa, ADSOEF Liaison, OSO Scholarship Chairman

RECIPIENTS OF ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION FUNDING

Esther H. Strickland Student Teaching Grant recipients:

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

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

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

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 Kartika Sari from Indonesia, studying at the University of Cincinnati

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 Cumberland

2022-2023

Debby Canter, OSO DKG - “History in the Hills” Biennial Seminar

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

DONORS

Individual, Chapter, In Honor of and In Memory of January 1, 2022 through December 31, 2022

INDIVIDUAL DONORS

Anonymous

Anonymous

Anonymous

Anonymous

Anonymous

Anonymous

Anonymous

Anonymous

Anonymous

Anonymous

Anonymous

Barbara Ade

Beth Archer

Joan Avery

R. J. Bahnsen

Joan Ballbach

Marilyn Bauer

Heidi Baxter

Patricia Beathard

Jeanne Bennett

Dorothy Blackburn

Joan Bostelman

Lona P. Bowman

Susan Bruggemeier

Holly Buente

Debby Canter

Patricia Cermak

Sandi Clawson

Karen Dauer

Donna DeWitt

Belinda Dixon

Rebecca Doak

Mary Jo Doebling

Terri Duesing

Karen Dunn

Karen Estridge

Hannah Fairbanks

Linda Falatic

Pam Feick

Ann Fetrow

Debbie Frazier

Lexa Freshley

Katie Gantz

Linda Geyer

Charlene Greene

Mary Ellen Hall

Alice Harker

Dr. Lois Harkins

Linda Harrison

Dr. Molly Helmlinger

Louann Henderson

Janet Hess

Ruth Hogsten

Millie Holzer

Carmel Jenkins

Karyn Kern-Lazear

Janet Kidd

Dr. Norma Kirby

Diana Kirkpatrick

Diana Klenk

Virginia Koch

JoAnn Krock

Linda Lawwill

Cindy Lawyer

Roberta Leach

Bonnie Lillibridge

Sue Loader

Judy McClanahan

Mary Kathryn McClendon

Eileen McNally

Jane Meese

Kay Miller

Shirley Moore

Helenlu Morgan

Margaret Murph

Donna Mae Myers

Melody Neuman

Patty Ondrus

Alice Penrose

Nancy Perkins

Linda Porteus

Carol Remington-Gray

Connie Rensink

Sandy Royer

Nancy Russell

Sue Samoviski

Tamara Schroeder

Ellen Smith

Chris Snoddy

Dr. Peggy Snow

Cindy Speakman

Wendy Spoeer

Claudia Stephens

Cathy Tenney

Molly Tharp

Jackie Thase-Burch

Sue Thuma

Ann Todd

Judy Valentine

Joyce Jones Weinkam

Katherine Kramer-

Wheeler

Florence Woodward

Sandra Woodyard

Linda Wright

Barb Zirke

CHAPTER DONORS

Beta Chapter

Zeta Chapter

Kappa Chapter

Lambda Chapter

Chi Chapter

Alpha Gamma Chapter

Alpha Delta Chapter

Alpha Eta Chapter

Alpha Lambda Chapter

Alpha Mu Chapter

Alpha Sigma Chapter

Alpha Upsilon Chapter

Alpha Phi Chapter

Alpha Psi Chapter

Beta Alpha Chapter

Beta Gamma Chapter

Beta Eta Chapter

Beta Lambda Chapter

Beta Nu Chapter

Beta Rho Chapter

Beta Upsilon Chapter

Beta Chi Chapter

Beta Psi Chapter

Gamma Eta Chapter

Gamma Iota Chapter

Gamma Lambda Chapter

Gamma Mu Chapter

Gamma Nu Chapter

Gamma Xi Chapter

Gamma Pi Chapter

Gamma Phi Chapter

Delta Delta Chapter

Delta Kappa Chapter

Delta Chi Chapter

Nu Rho Chapter

DKG OSO Executive Board
and Advisory Committee

DKG Ohio State
Organization

IN HONOR OF

Alice Penrose in honor of Dr. Ruth A. Brooks
Alpha Sigma Chapter in honor of Alpha Sigma members
Ann Todd in honor of Leadership Management Seminar
Anonymous in honor of ADSOEF's original Board of Directors
Anonymous in honor of Deborah Sheskey, Linda Fife, and Chris Snoddy
Anonymous in honor of Dr. Norma Kirby
Anonymous in honor of Sandy Royer, Beth Archer
Anonymous in honor of Zeta Chapter sisters
Barbara Ade in honor of Holly Buente
Beth Archer in honor of Donna Myers
Carmel Jenkins in honor of Bev Babbert
Carmel Jenkins in honor of Delta Theta Sisters
Cathy Tenney in honor of Dr. Lois Harkins
Cathy Tenney in honor of OSO Leadership Team and ADSOEF Board of Directors
Belinda Dixon in honor of Debby Canter
Delta Kappa Chapter in honor of 50th Year of charter for Delta Kappa Chapter
Donna Mae Myers in honor of Patti Palmer
Dr. Lois Harkins in honor of Debby Canter, Judy Rank, Cathy Tenney and Debbie Frazier
Dr. Lois Harkins in honor of Dr. Norma Kirby, Jackie Thase-Burch
Dr. Lois Harkins in honor of Eileen McNally, Joan Bostelman
Dr. Lois Harkins in honor of Jackie Thase-Burch, Eileen McNally, Ann Todd, Cindy Lawyer
Dr. Lois Harkins in honor of Jane Meese, Susan Bruggemeier, Katie Gantz and Janet Myles
Dr. Norma Kirby in honor of Beth Archer
Dr. Norma Kirby in honor of Eileen McNally, Joan Bostelman
Dr. Norma Kirby in honor of Holly Buente
Dr. Norma Kirby in honor of Jackie Thase-Burch
Dr. Norma Kirby in honor of Judy Rank
Dr. Norma Kirby in honor of Kim Pittser
Dr. Norma Kirby in honor of Mr. Dan Roberts
Dr. Norma Kirby in honor of Nancy Hammond
Dr. Norma Kirby in honor of Sandy Royer
Dr. Norma Kirby in honor of Sue Loader
Gamma Lambda Chapter in honor of all Gamma Lambda members
Hannah Fairbanks in honor of Karen Berry
Heidi Baxter in honor of Gamma Nu Chapter
Jackie Thase-Burch in honor of ADSOEF Directors
Jane Meese in honor of Sandy Royer, chairman and ADSOEF Board of Directors
JoAnn Krock in honor of Evelyn Ferguson
Karen Estridge in honor of sisters of Zeta Chapter
Kathy McClendon in honor of ADSOEF Board of Directors, Sandy Royer, Chairman
Kathy McClendon in honor of Valerie Miller
Katie Gantz in honor of Cindy Speakman
Katie Gantz in honor of Helen Romes
Linda Harrison in honor of Cecilia Andzik-Grewe
Linda Harrison in honor of Nora Stang
Linda Harrison in honor of OSO's 85th anniversary
Linda Porteus in honor of Barbara Smith
Marilyn Bauer in honor of Ellen Andrews
Mary Kathryn McClendon in honor of 2021-22 ADSOEF Board of Directors, DKG OSO Leadership Team
Patricia Cermak in honor of Florence Woodward
Rebecca Doak in honor of Laura Bemus
Sandy Royer in honor of Beth Archer, Diane Brogan-Adams, Jackie Thase-Burch, Barbara Zirke
Sandy Royer in honor of charter members of Delta Kappa: Karen Clark, JoAnn Heil, Deanna Roth,
Marilyn Slusser
Sandy Royer in honor of Dr. Norma Kirby, Diana Kirkpatrick
Shirley Moore in honor of Delores Moore, Barbara Rine
Susan Brueggemeier in honor of women of Delta Iota Chapter
Tamara Schroeder in honor of Patricia Cermak
Virginia Koch in honor of Dr. Lois Harkins

IN MEMORY OF

Beta Alpha Chapter in memory of Patricia Schuldt
Beta Psi Chapter in memory of Joan Elliott
Beta Rho Chapter in memory of Carla Mavis
Cathy Tenney in memory of Bob McNally
Cindy Lawyer in memory of June Lawyer
Debby Canter in memory of Regina Chaney
DKG OSO Executive Board and Advisory Committee in memory of Winifred Jacoby
DKG OSO Executive Board and Advisory Committee in memory of Bob McNally
Donna DeWitt in memory of Ann Sickels
Donna Mae Myers in memory of Winifred Jacoby
Dr. Lois Harkins in memory of Bob McNally, Winifred Jacoby
Dr. Norma Kirby in memory of Bob McNally, Winifred Jacoby
Dr. Norma Kirby in memory of Carol Witherspoon Carey
Dr. Norma Kirby in memory of Ruth Sharrer, a devoted DKG member
Dr. Norma Kirby in memory of Susan Reid
Gamma Xi Chapter in memory of Ruth Phelps
Helenlu Morgan in memory of Patricia Schuldt
Holly Buente in memory of Joanne Harrold
Holly Buente in memory of Robalee Burns Dinopoulos
Jackie Thase-Burch in memory of Gail Bulach
Jackie Thase-Burch in memory of Laura Bemus
Joan Avery in memory of Elizabeth Grado
Joan Avery in memory of Joanne Bosak
Joan Ballbach in memory of Sharon Averwater
Joan Bostelman in memory of Patricia Eshbaugh, Winifred Jacoby
Judy McClanahan in memory of Emily J. Williams
Judy Valentine in memory of Eileen Young
Kathy McClendon in memory of Carol Germond
Katie Gantz in memory of Bob McNally
Linda Harrison in memory of Winifred Jacoby
Mary Jo Doebling and members of Beta Nu in memory of former president, Peggy Gentile
Molly Tharp in memory of Sally Gillmore
Nu Rho Chapter in memory of Marilyn August, Marla A. DeCapite, Laretta Sinkosky, Mary Cleveland,
Sally Gillmore
Patricia Beathard in memory of Carla Mavis
Sue Loader in memory of Mary Ann Brown

ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION TREASURER'S ANNUAL REPORT

July 1, 2022 through **January 31, 2023**

REVENUE

Public Support

- * Chapter & Direct Appeal-HEART Campaign-
\$7990

(Funds supported: Strickland, Lifelong Learning, & Woodward)

- * Brundige Stein Donation-\$306,861

TOTAL: \$314,851

Investments

- * Interest, Dividends, Other-\$7,347
- * Mutual Funds Capital Gains-\$184
- * Advisor Fee- **-\$2,337**
- * Change in Market Value- **-\$4,060**

TOTAL: \$1,134

PORTFOLIO

- * Royal Bank of Canada-\$548,848
- * Huntington Bank-\$332,394
- * US Bank Money Market-\$41,223
- * US Bank Checking & Credit Reward-\$8,354

TOTAL: \$930,819

(Compared to 01/31/2022 : \$683,950)

ITEMS OF INTEREST

- * Needed to transfer \$19,000 from savings to checking to pay attorney.
- * Needed to withdraw from RBC's International Fund (\$2500) and Student Teaching (\$7900) to pay spring semester grants in mid-November. (I was working remotely and was uncertain of my return.)
- * Switching portion of funds in Huntington and US Bank accounts into short-term CDs.

EXPENDITURES

Grants

- * A. Margaret Boyd-Cincinnati & Ohio State-\$7500 (3)
- * Esther H. Strickland-Bowling Green, Cincinnati, Miami, Ohio State, Toledo, & Wright State-\$15,000 (10)

Projects

- * Elm Street Elementary-Girls Club-Independent Skills \$500(1)

TOTAL: \$23,000

Business

- * AIM Insurance-Liability-\$365
- * Contracts-Editor & Webmaster-\$1000
- * Contract-Brundige Stein Attorney-\$19,000; previously paid \$1,000 retainer
- * CPA-\$750
- * Ohio Attorney General Registration-\$200
- * IRS-Excise Tax-\$226
- * Technology-Zoom, Constant Contact, & Weebly (2)-\$308

Board and Committee

- * Postage-Donor Relations & Treasurer-\$69
- * Mileage-Chapter Visit, Attorney Office, & Printer-\$224.
- * Fundraising-Printing, Mileage, & Postage-\$551
- * Printing, Labels, Envelopes, & Ink-Donor Relations & Treasurer-\$352

TOTAL: \$23,045

Expenditures Grand Total:

\$46,045

BUDGET FOR ADSOEF 2023-2024

Revenue Items	Amount
OSO Chapter Contributions	700
Direct Appeal	15,000
Individual Contributions	1,000
RBC Dividends and Interest	19,000
Transfer OSO Scholarship	1,000
Other Income	65
Interest-Huntington & US Bank Bal	10,000
Convention Fundraiser	1,000
TOTAL	\$47,765.00

Disbursement Items	Amount
Accounting Fees (CPA)	750
Insurance (Liability and Bond)	365
Ohio Charitable Registration	200
Webmaster and Editor Contracts	1,000
Ohio History Connection Donation	50
Postage	350
Printing	700
Office Supplies	100
Mileage	300
QuickBooks and IT Support	50
Zoom, Weebly (2), Constant Contact	500
Marketing	500
Fundraising	1,500
Educational Projects	2,500
Leadership Development	1,000
Lifelong Learning	1,000
Federal Excise Taxes	300
Annual Meeting	1,000
A.M. Boyd International Studies	13,000
Blanton Scholarship	1,500
Woodward Scholarship	2,500
Jane Brundige Stein Scholarship	3,250
Strickland Student Teaching Grants	15,000
Huntington Safe Deposit Box	50
Donor Relations	300
TOTAL	\$47,765.00