

**2021 FOUNDATION REPORT**

**ADSOEF Annual Meeting**

**April 8, 2021**

**ADSOEF BOARD OF DIRECTORS**

Dr. Lois Harkins, Alpha Lambda, 2020-2021

Treasurer

Millie Holzer, Beta Zeta, 2020-2021

Finance Committee Chairman

Dr. Norma Kirby, Alpha Delta, 2017-2021

Secretary, Nominating Committee Chairman

Diana Kirkpatrick, Alpha Delta, 2019-2021

OSO President

Karyn Kern-Lazear, Gamma Phi, 2019-2023

Governance Committee Chairman

M. Kathryn McClendon, Zeta, 2017-2021

Board Chairman

Elizabeth Monahan, Beta Lambda, 2017-2021

Donor Relations Committee Chairman

Sandy Royer, Delta Kappa, 2019-2023

Fundraising Committee Chairman

Marilyn Slusser, Delta Kappa, 2017-2021

Board Vice Chairman, Scholarship Committee Chair.

Jackie Thase-Burch, Alpha Upsilon, 2019-2023

Marketing Committee Chairman

Note: Director email addresses can be found at **adsoefweebly.com** under the **ABOUT US** tab, or simply write your query under **Contact Us**.

**FOUNDATION HISTORY**

Alpha Delta State Ohio (now known as Ohio State Organization of DKG International Society or OSO) was the originator of Alpha Delta State Ohio Educational Foundation (ADSOEF). Members at the 2017 State Convention authorized the establishment of the Foundation and subsequently the A. Margaret Boyd Overseas Foundation organized in 1981 was renamed Alpha Delta State Ohio Educational Foundation. Discussion regarding the creation of a foundation began in earnest during the 2011-2013 biennium, but the possibility had been broached even earlier than that.  Over the years, several members of the Alpha Delta State Executive Committee had attended workshops at International Conventions on the benefits of a foundation and the process of creating one.  They were motivated by the fact that other state organizations had created foundations.

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 Ohio State Organization Convention General Session. In 2021, seven Directors will be elected. In 2023, and yearly thereafter, five Directors will be elected for two-year terms. Beginning with the 2021 election, the President of Ohio State Organization shall be invited to serve as an ex-officio, non-voting member of the ADSOEF Board of Directors. The Board of Directors elect a Chairman, Vice-Chairman, and Secretary.

The official logo was designed by Heather J. Storer, Alpha Chi Chapter, and was first revealed at the 2018 ADSOEF Annual Meeting. ADSOEF Bylaws were originally approved at the 2017 Annual Meeting and last updated January 7, 2021.

All members of OSO are also members of Alpha Delta State Ohio Educational Foundation and can participate in, make motions, and vote at the Annual Meeting. No membership fee is required by the Foundation.

Through the generous support of its members, ADSOEF is truly funding the future of excellence in education.



**ADSOEF *- funding the future of excellence in education***

**A MESSAGE FROM OUR CHAIRMAN**

My, oh my, what a year of change, disruption, confusion, and fear! What a year of possibilities for improvement, for helping our neighbors, for loving and caring, and for opportunities for growth! These mixed emotions and realities have become the new normal, but we all seem to be adapting. Yes, good can come out of a struggle!

The governing body of ADSOEF has had its own struggles in 2020-2021, replacing two knowledgeable and experienced Directors with two more knowledgeable and experienced interim Directors who have been working diligently to understand the Foundation and make its operations understandable to all. Throughout the intense process of questioning, seeking answers and learning, we have all been challenged to be better sisters and just plain better people with a heart for all.

How *apropos* that your Fundraising Committee chose “A Heart for All” as the theme of their direct appeal for this year. So many of you have given very generously! Your generosity without restriction is deeply appreciated as we live out our mission to support educators focused on providing excellence in education. The Finance Committee has been able to begin the rebalancing of funds so that all ADSOEF Funds benefit. You are always welcomed to contribute to your favorite fund within our mission, but giving to ADOSEF without restriction will continue to give the Board flexibility to do our work creatively.

Through your Foundation you have been giving deserving educators and pre-service teachers the support they need to help their students achieve excellence in life through the power of education. You have been empowering others to pass on truth, knowledge, and the literacy that will keep this country and other countries free. You have been building the future!

ADSOEF is here for you! Your Directors have been concerned that we haven’t received as many applications for funding as we would like. Not only do you help to build the future when you give, you also build the future when you encourage Sisters and others to apply for ADSOEF scholarships, grants, fellowships, and awards or by applying for these opportunities yourself.

This Foundation “exists for the purpose of raising, managing and distributing funds . . . to serve charitable purposes relating to professional and personal growth of educators and educational excellence.”

We exist to support educators who are studying and striving to provide the best education possible for their students. We exist to support you and your personal and educational goals.

Thank you for attending the fourth Annual Meeting of ADSOEF and for supporting your Foundation!

ADSOEF Directors encourage your continued participation, appreciate your input, and truly value your support!

Sincerely,

**Kathy**



**ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION**

**ANNUAL MEETING AGENDA**

**5100 Upper Metro Place, Dublin, Ohio**

**Embassy Suites by Hilton**

**March 20, 2020 8:30 – 9:30 PM**

**ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION**

**ANNUAL MEETING AGENDA**

*ZOOM Meeting Room*

**April 8, 2021 7:00 – 8:00 PM**

Call to Order and Meeting Guidelines

Approval of Minutes

Treasurer’s Report

Committee Reports

 Finance

 Fundraising

 Marketing

 Donor Relations

 Educational Services

 Scholarship

 Governance

 Nominating

Unfinished Business

New Business

 Election of Directors

Announcements

Adjournment

Kathy McClendon, Chairman

Dr. Norma Kirby, Secretary

Dr. Lois Harkins, Treasurer

Millie Holzer, Chairman

Sandy Royer, Chairman

Jackie Thase-Burch, Chairman

Betty Monahan, Chairman

Christine Snoddy, Chairman

Marilyn Slusser, Chairman

Karyn Kern-Lazear, Chairman

Dr. Norma Kirby, Chairman

ADSOEF Nominating Committee

Kathy McClendon, 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.



**ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION**

**MINUTES**

**2020 Annual Meeting via Zoom**

**August 4, 2020**

The meeting was recorded.

Chairman Mary Kathryn McClendon called the ADSOEF 2020 Annual Meeting to order at 3:07 p.m. and explained the Ground Rules for the Zoom meeting.

Joyce Jones-Weinkam, Gamma Xi, served as Parliamentarian for the meeting.

One hundred nine members registered for the Annual Meeting with 82 in attendance which included ten Directors.

The Minutes of the 2019 ADSOEF Annual Meeting were approved as distributed.

Treasurer Diana Haskell gave the Treasurer’s Report.

* Reviewed the Statement of Financial Activity.
* Described the impact COVID-19 had on investments
* Stated the breakdown of expenses
	+ Operating 24%
	+ Fundraising 1%
	+ Program Expenses and Program Awards 75%
* Presented an overview of each fund including the beginning balance, revenue stream, expense stream, and fund balance

 The Treasurer’s Report was filed for record.

**COMMITTEE REPORTS**

Meier Bauer, Finance Committee Chairman, gave the Committee report.

* Presented the proposed budget for July 1, 2020, through June 30, 2021, including revenues and expenses.
* Explained that the budget was a significant deficit budget and was prepared prior to the onset of COVID-19.

**MOTION**

Meier Bauer moved on behalf of the Finance Committee that the members of Alpha Delta State Ohio Educational Foundation accept the 2020-2021 budget as presented with the understanding that the Directors’ legal duty to manage accounts requires them to routinely monitor the budget, track it throughout the year, and revise it as necessary.

Vote:

Yes 99%

No 1%

The motion was adopted.

Karyn Kern-Lazear, Governance Committee Chairman, gave the Committee report.

* Explained that the major focus of the Committee during 2019-2020 was revising the ADSOEF Bylaws.
* Clarified the reasons for the revisions.
* Reviewed the significant revisions with emphasis on Article V, Board of Directors.
* Explained how the revisions affect ADSOEF members.
* Noted that the revised Bylaws are available on the website at adsoef.weebly.com.

Dr. Norma Kirby, Nominating Committee Chairman, gave the Committee report.

* Encouraged members to consider applying for the position of director.
* Directed members to adseof.weebly.com for the director application, description of position, and written Annual Meeting report.
* Noted that applications are due January 15, 2021.

Sandy Royer, Fundraising Committee Chairman, gave the Committee report.

* *“Building from the Heart”* 2019-2020 campaign was a success.
* *“A Heart for All”* 2020-2021 campaign will focus on contributions to the without donor restriction fund. Contributors will still have the option to choose the fund of their choice using the Contribution Form.
* Expressed appreciation to donors for supporting the Foundation mission.

Jackie Thase-Burch, Marketing Committee Chairman, gave the Committee report.

* Marketing is invested in technology.
* Demonstrated how to navigate ADSOEF on Facebook.
* Encouraged members to review the written Committee report on adsoef.weebly.com.

Betty Monahan, Donor Relations Committee Chairman, gave the Committee report. She expressed a sincere thank you from the Committee, Directors, and recipients noting that even during a pandemic we are “forward, moving ever!”

Diana Haskell, Educational Services Committee Chairman, gave the Committee report.

* Emphasized creating change.
* Explained that the Committee formed in August 2019 is responsible to promote Lifelong Learning, Individual/Classroom/Community Projects, and Leadership.
* Developed applications and submission criteria which are available at adsoef.weebly.com.
* Encouraged members to submit applications which are available at any time.

Marilyn Slusser, Scholarship Committee Chairman, gave the Committee report.

* Reviewed the work of the Committee noting that all applications and accompanying forms have been updated.
* Presented the ten Esther H. Strickland student teacher grant recipients including photos and the universities they attend.
* Shared information about Nominchimeg Davaanyam from Mongolia, the current A. Margaret Boyd Overseas fellowship recipient. Nomin has completed her studies at Kent State University and will be returning to Mongolia.
* Announced that Gunel Alasgarova from Azerbaijan has been selected to receive the

A. Margaret Boyd Overseas fellowship and will be studying at Kent State University.

There was no unfinished or new business.

Chairman McClendon thanked members for participating in the Annual Meeting and adjourned the meeting 4:17 p.m.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Dr. Norma Kirby, Secretary M. Kathryn McClendon, Chairman

**TREASURER’S REPORT**

Alpha Delta State Ohio Educational Foundation’s Treasurer Position has a new look. Following the resignation of Diana Haskell, the Board of Directors approved the appointment of Dr. Lois Harkins as a Director serving as Treasurer for the remainder of the 2021 term. A limited Bookkeeper Position was developed to permit a smooth transition of funds and transactions during this period. Together, Diana and Lois have transferred all printed documents and files, held meetings at banking institutions, and completed signature cards and online accounts. Zoom meetings, telephone calls, text messages, and emails continue. Once finalized, QuickBooks data will be transferred to the Treasurer. All ADSOEF investments are securely maintained with data analyzed and shared monthly, with the Treasurer providing requested data to the Financial Chair for preparation of the upcoming budget.

See Appendix A.

*Dr. Lois Harkins, Treasurer*

**ADSOEF COMMITTEE REPORTS**

**July 1, 2020 through Present**

**FINANCE COMMITTEE**

The Finance Committee has been learning the structure of the finances of ADSOEF, studying the responsibilities of the committee, and developing a Budget for 2021-2022. To say this has been a busy six (6) months would be an understatement.

To compile a clear, workable Budget required that we understand the requirements of a Private Foundation. One of the requirements is that “a minimum 5% of asset holdings are distributed each year.” So, our first goal was to determine the Total Assets of the Foundation. Using information from the end of the 2020 fiscal year, we were able to locate the funds of ADSOEF and to calculate our Total Assets. (See Appendix B)

We compared numbers from the Actual Revenue and Disbursement in 2019-2020 and the Budget of 2020-2021. With this information we created a Budget for 2021-2022 with condensed line items. (See Appendix C)

Our plan for the coming year is to present a Budget with three (3) columns. We will report the Actual Revenue and Disbursements for 2020-2021, the Budget for 2021-2022, and the Proposed Budget for 2022-2023. This comparison will more clearly represent our financial resources and actions. Communication of information is an important element of our membership.

Thanks to the Committee for their giving of their time, thoughts, and knowledge as we serve.

*Millie Holzer (Beta Zeta) Chairman; Dr. Lois Harkins (Alpha Lambda) Treasurer; Dr. Pam Anderson (Alpha Delta); Donna Myers (Kappa); Jane Houser (Gamma Phi)*

**FUNDRAISING COMMITTEE**

The most important focus of the Fundraising Committee is funding the Foundation’s program services. We brainstorm ideas, strategize best delivery vehicles, set a goal for total contributions, and carry out activities to raise funds. We evaluate and give recommendations for future philanthropic activities.

 Electronic communication through *The Voice,* E-Blasts, and social media including Facebook are becoming the norm. This year we had sponsors stepping up to offer Matching Funds to the contributions received and this was successful! The OHIO Heart-meter on the Foundation’s webpage and in *The Voice* showed the steady progress toward our goal. Your donations ensured we met the goal for “A Heart for All.”

 Our Birthday Luncheon tradition of giving will occur virtually during OSO Convention. Celebrate by gifting the fund of YOUR choice, the amount you would give at our in-person luncheon. Sisters often select the Esther H. Strickland fund as we hear about our Student Teaching awardees. Also, please add the dollars you would have used to purchase Raffle Tickets. Since fundraising is ongoing, we welcome your contributions at any time.

 Philanthropy is about the donor, so we focus on our members as we carry out our work. We do our best to inform you about Foundation beneficiaries and the impact your investment has in their professional and personal lives. We are eternally grateful for the generosity of our OSO sisters.

 We highly commend ADSOEF Chapter Representatives for being the Foundation’s voice to members. We pledge to be honorable and trustworthy stewards of all your contributions. We value your input and welcome your ideas. Email: sandyroyer51@gmail.com

*Sandy Royer (Delta Kappa) Chairman; Diane Brogan-Adams (Delta Kappa); Jackie Thase-Burch (Alpha Upsilon); Jane Meese (Alpha Xi); Barb Zirke (Alpha Psi)*



**MARKETING COMMITTEE**

The Marketing Committee continues to participate in meetings held by Fundraising and Scholarship Committees. Marketing continues to participate in webinars for marketing/fundraising initiatives.

Working with Fundraising, a donation card was made available starting in November in time for Giving Tuesday and the winter holidays. This was also uploaded to the ADSOEF website along with the “OHIO Heart-meter” to track donations. The card was also emailed to chapters in case members wanted a hard copy to use for donations. A link to the website was also provided on Facebook so donors could quickly access the site.

A Facebook page is also updated regularly to showcase educational accomplishments, to promote state events and to promote fundraising activities and progress. Of course, it is not all business, with funny memes and encouraging posts sprinkled throughout to support the educational morale.

The number of Facebook followers has increased from 57 to 74 since July, 2020. This is a small but mighty group! From October of 2017- July of 2020, the Facebook page had reached 8621 followers. From January to December 2020, our total number of people reached was 28,790 people. That is 23,718 from July to December of 2020! Our followers have shared information with others who continued to share the information.

Continue to encourage friends to “Like” the ADSOEF Facebook page!

*Jackie Thase-Burch (Alpha Upsilon) Chairman; Margaret Archangel (Delta Theta); Roberta Phillips (Delta Kappa)*

**DONOR RELATIONS COMMITTEE**

The Donor Relations Committee has been quite busy this year, thanks to the generosity of our members. Though this past year has been anything but “normal”, the generosity, kindness, and commitment to Educational Excellence in Education has been awe inspiring.

A Heart for All Fundraising Campaign has literally and figuratively filled DKG Ohio. We are so grateful for all who have participated to help keep the goals of the Foundation thriving. Proving once again that Ohio and DKG Ohio are truly the “Heart of it All”.

The Committee strives to keep current with acknowledgment letters written upon the receipt of a donation; and later with friendly, handwritten “thank you” notes. We want you to know that your philanthropy is the reason this Foundation is able to provide scholarships, grants, and funding to Ohio Educators.

**YOU are the HEART of ADSOEF! THANK YOU!!**

*Betty Monahan (Beta Lambda), Chairman; Patricia Cermak (Gamma Rho); Debra Frazier (Beta Rho); Mary Ellen Hall (Beta Lambda); Dr. Norma Kirby (Alpha Delta)*

**EDUCATIONAL SERVICES COMMITTEE**

This Committee provides awards in three areas: **Individual/Classroom/Community Project Fund, Leadership Development Fund, and Lifelong Learning Fund**. Awards from the Leadership Development Fund were given in August 2020 to Meier Bauer (Gamma Phi) and Diana Haskell (Gamma Phi). Both attended a webinar about nonprofit governance and legal compliance. In addition, Diana Haskell also attended a training on using QuickBooks for nonprofit organizations. No grants were made from the other two funds in 2020.

Your Foundation’s committee members are eager to assist you or your chapter to implement projects impacting your classroom or community. We encourage you to attend workshops to develop and grow your leadership skills which will improve our Society and Foundation. Interested in participating in lifelong learning opportunities? This committee will help you! Applications can 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)*

**SCHOLARSHIP COMMITTEE**

The ADSOEF Scholarship Committee is thrilled to report that they have had a very rewarding and successful year. All scholarship applications were revised and a new scoring rubric was devised for the Esther H. Strickland Student Teaching Grants. All state supported universities were contacted, and their information was updated for the dissemination of material.

We received a new recipient for the A. Margaret Boyd Overseas Fellowship. She is, Gunel Alasgarova from Azerbaijan. Gunel is studying evaluation and measurement, foundations of leadership administration at Kent State University. Gunel arrived in the U. S. in January of 2021. She is thrilled to be here and to study on Kent State’s campus, as her whole first semester was done remotely in Azerbaijan.

Currently we are reviewing the Esther H. Strickland student teaching grant applications and will be awarding those grants at the OSO State Convention. This year we received applications from four different state supported universities and their branches.

One very important achievement the OSO Scholarship Committee achieved during the year was that Miami University would continue to honor the Ruth Grimes Scholarship for graduate studies at Miami University; however, if there were no candidates for graduate study, they in turn would honor the Esther H. Strickland Student Teaching recipients at Miami University and use the Ruth Grimes Scholarship monies to fulfill those grants. This was a very rewarding achievement for both parties.

Throughout this year, we will be looking forward to awarding more scholarships, revising applications, as needed, reviewing dossiers from Fulbright for A. Margaret Boyd Fellowship and continuing to give scholarships from your generous contributions with the purpose of providing support for professional and personal growth of educators.

*Marilyn Slusser (Delta Kappa) Chairman; Sharon Calhoun (Beta Lambda); Sue Loader (Alpha Psi); Danielle Sobczyk (Alpha Theta); Jackie Thase-Burch (Alpha Theta)*

**GOVERNANCE COMMITTEE**

The Governance Committee did a major revision of the ASDOEF Bylaws and these were approved by the Board of Directors in February 2020. The revisions were shared with the membership during the last Annual Meeting in August 2020.

 During this past year, issues came before the Board that required another look at specific Bylaws. The Board agreed that the current ones did not address the problems/needs that became apparent. Therefore, some Articles and Sections of the Bylaws were examined and revisions proposed. These changes were approved by the Board at the November 2020 and January 2021 meetings. The portions of the Bylaws that have been revised are the following:

* Article I, Section B. – The legal address of ADSOEF was changed from Cincinnati, Ohio to Washington Court House, Ohio.
* Article V, Section B, 7 – This was a new addition to this Article and provided the needed actions when a Director needs to resign her post. A six week written notice is now required. This can be waived in case of serious illness or an accident to the Director.
* Article V, Section C, 3 (formerly #4) – This section states when the officers of the Board will be elected and who is eligible to vote. If the election occurs prior to July 1st, currently elected officers as well as newly elected incoming officers may vote.

 The revised Bylaws document is on the ADSOEF web site. Please refer to it and if you have any questions, contact any member of the Governance Committee. The members are Karyn Kern-Lazear, Chairman, Dr. Norma Kirby, Kathy McClendon, Jane Meese, and Joyce Jones Weinkam.

 ADSOEF is emerging from its “infancy” and continues to develop and grow into a strong Foundation. The Governance Committee, as well as the Board of Directors as a whole, recognizes that Bylaws are not stagnant articles but ones that need to be continually reviewed and revised to determine if they still meet the needs of the organization.

*Karyn Kern-Lazear (Gamma Phi) Chairman; Joyce Jones-Weinkam (Gamma Xi); Dr. Norma Kirby (Alpha Delta); Jane Meese (Alpha Xi)*

**NOMINATING COMMITTEE**

The Chairman of the Alpha Delta State Ohio Educational Foundation Board of Directors appointed two current Directors and three non-directors to the ADSOEF Nominating Committee for 2019-2021 representing all geographic regions of Ohio State Organization and ADSOEF. The Committee will present a slate of candidates for available director positions at the Annual Meeting beginning in 2021, and each year thereafter beginning in 2023. The ADSOEF Director Application and Description of Position are available on the Foundation website. Any member of Ohio State Organization and ADSOEF is eligible to serve as a Director of the Foundation. The Committee reviewed applications and recruited directors for the election at the 2021 Annual Meeting.

*Dr. Norma Kirby (Alpha Delta) Chairman; Sally Gillmore (Sigma); JoAnn Ingram (Omicron); Karyn Kern-Lazear (Gamma Phi); Barbara J. Smith (Zeta)*

**SLATE OF CANDIDATES FOR ADSOEF DIRECTOR**

Debbie Frazier, Beta Rho Chapter, 2021-24

Dr. Lois Harkins, Alpha Lambda Chapter, 2021-24

Millie Holzer, Beta Zeta Chapter, 2021-24

Dr. Norma K. Kirby, Alpha Delta Chapter, 2021-23

Judith Rank, Gamma Gamma Chapter, 2021-24

Marilyn Slusser, Delta Kappa Chapter, 2021-23

Christine Snoddy, Alpha Lambda Chapter, 2021-24

**RECIPIENTS OF ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION FUNDING**

**Esther H. Strickland Student Teacher Grant recipients**:

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

**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 Overseas Fellowship recipients:**

2018-2019

Nominchimeg Davannyam from Mongolia, studying at Kent State University

2020-2021

Gunel Alasgarova from Azerbaijan, studying at Kent State University

**Leadership award recipients:**

2020

 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”

**Project award recipients:**

2019

Sue Thuma, Alpha Psi Chapter, Project Leader

“Read to Succeed: Summer Reading Retention”

**ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION CONTRIBUTORS**

**July 1 – December 31, 2020**

***Individuals***

Anonymous

Anonymous

Anonymous

Anonymous

Anonymous

Cathy Adams

Laura Atherton

Jay Bahnsen

Deborah Barry

Jeanne Benn

Joan Bostelman

Lona Pierson Bowman

Sharon Calhoun

Deborah Canter

Patricia Cermak

Susan Chemas

Sandi Clawson

Karen Estridge

Pam Feick

Katie Gantz

Susan Garretson

Sally Gillmore

Charlene Green

Dr. Lois Harkins

Linda Harrison

Carmel Jenkins

Dr. Norma Kirby

Katherine Kramer

JoAnn Krock

Sue Loader

John Edward McClendon

Eileen McNally

Beverly McPherson

Jane E. Meese

Julia Ann Miller

Betty M. Monahan

Willa Mullins

Donna Mae Myers

Patty Ondrus

Vicky Ottman

Kathleen Paulenich

Sandra Royer

Judith Ruen

Nancy Russell

Jan Schoellman

Cathy Tenny

Sue Thuma

Ann Todd

Judy Valentine

Altha Joyce J. Weinkam

Linda Wright

***Chapters***

Zeta

Lambda

Pi

Tau

Alpha Delta

Alpha Lambda

Alpha Xi

Alpha Upsilon

Alpha Psi

Beta Gamma

Beta Nu

Beta Rho

Gamma

Gamma Iota

Gamma Phi

Delta

***Organization***

DKG Ohio State Organization

***Gifts made in memory of their legacy***

Janet Braise by Linda Harrison

Jeanne Brandt by Linda Harrison

Tamara Colon by Beta Gamma Chapter

Pat Eshbaugh by Joan Bostelman

Sara Herfel by Willa Mullins

Patty Napier by Alpha Xi Chapter

Dorothy Rankin by Pi Chapter

Lynne Risch by Alpha Xi Chapter

Betty Schaeffer by Beta Rho Chapter

Ethel Shaffer by Carmel Jenkins

Norma Smith by Carmel Jenkins

Geraldine Wilson by Kathleen O’Malley

Norma Wilson by Pam Feick

Eileen Young by Judy Valentine

***Gifts made in honor of service and dedication***

2020-21 ADSOEF Chapter Representatives by Mary Kathryn McClendon

2020-21 ADSOEF Fundraising Committee by Sandra Royer

2020-22 Zeta Chapter Officers by Ann Todd

Beth Archer by Dr. Lois Harkins

Dr. Ruth Brooks by Dr. Lois Harkins

Gretchen Butler by Mary Kathryn McClendon

Patricia J Cermak by Dr. Lois Harkins

Karen Estridge by Mary Kathryn McClendon

Katie Gantz by Gamma Phi Chapter

Dr. Lois Harkins by Mary Kathryn McClendon

Diana Haskell by Dr. Lois Harkins

Christa Jeanne by Jeanne Bennett

Dr. Mary Jane Kaufman by Dr. Lois Harkins

Dr. Norma Kirby by Dr. Lois Harkins

Dr. Norma Kirby by Cathy Tenney

Diana Kirkpatrick by Dr. Lois Harkins

Virginia Koch by Dr. Lois Harkins

Elizabeth Koleno by Mary Kathryn McClendon

Dr. Marian Kurner by Dr. Lois Harkins

Millie Holzer by Dr. Lois Harkins

Millie Holzer by Mary Kathryn McClendon

Mary Kathryn McClendon by Dr. Lois Harkins

Mary Kathryn McClendon by Dr. Norma Kirby

Mary Kathryn McClendon by John Edward McClendon

Eileen McNally by Cathy Tenney

Jane Meese by Dr. Norma Kirby

Donna Myers by Dr. Lois Harkins

Donna Myers by Dr. Norma Kirby

Maxine Robinson by JoAnn Krock

Marilyn Slusser by Dr. Lois Harkins

Barbara J Smith by Dr. Lois Harkins

Florence L Woodward by Patricia Cermak

Florence L. Woodward by Dr. Lois Harkins

Zeta Chapter by Karen Estridge

# **INDIVIDUAL DONORS**

**2017-2020**

Anonymous

Cynthia Y. Acklin

Cathy Adams

Diane Brogan-Adams

Janet Adams

Barbara Ade

Nova Adkins

Bonita Agawa

Marilyn Allen

Esther Alspaugh

Ellen Andrews

Margaret Archangel

Beth Archer

Lynn E. Arnott

Laura Atherton

Mary Ann Augustyn

Joan Avery

Beverly Babbert

Jay Bahnsen

Juanita Barber

Reba Barney

Deborah Berry

Kathie Bates

Marilyn Bauer

Meier H. Bauer

Kathryn Behm

Jeanne Bennett

Jo Ann Benseler

Karen Bernard

Dorothy Blackburn

Melody Blake

Marlene Bolea

Joan Bostelman

Lena K. Bowman

Lona Pierson Bowman

Nan Bretz

Margaret (Peggy) Brooks

Susan Brueggemeier

Pamela Brunetti

Pat Bruns

Sara A. Burky

Sharon Calhoun

Mary A. Callahan

Heather Campbell-Lieberman

Nancy Canniff

Richard Cannizzaro

Deborah Canter

Brenda Ceplecci

Patricia Cermak

Lois Chandler

Susan Chemas

Sandi Clawson

Barbara S. Cleveland

Sue D. Cline

Elizabeth (Betty) Collins

La Rita Condon

Jennifer Conkle

Freda Cook

Donna Cooper

Connie Costello

Kathryn Cryder

Karen Dauer

Janet Davidson

Loretta Davidson

Andrea Dean

Darlene M. Depouw

Patti Dice

Linda Diltz

Judy Dixon

Rebecca Doak

Mary Jo (Bunny) Doebling

Karen Dombrowski

Terri Duesing

Karen Dunn

Sue Eades

Janice Eddey

Karen Estridge

Bonnie Eyestone

Mary Eyink

Linda Falatic

Pat Farrenkopf

Pam Feick

Jennifer Felker

Ann Fetrow

Fonda Fichthorn

Debbie Frazier

Geraldine Frechtling

Norma J. Frederick

Lizabeth Fresch

Janet Gahn

Katie Gantz

Susan Garretson

Linda Geyer

Sally Gillmore

Nancy Glasgow

Barri Grandey

Charlene Greene

Cathy Greenleaf

M. Louise Greenlee

Claudia Grimes

Sherry Grimes

Janet Halter

Edna Hansen

Alice Harker

Dr. Lois Harkins

Erica Harley

Linda Harrison

Diana C. Haskell

Debbie Hayes

Laura Haynes

Louann Henderson

Pamela Henney

Martha Henry

Dorene Henschen

Joanne Hepp

Janet Hess

Ruth Hogsten

Cherisse Hopper

Nancy J. Hoover

Jane Houser

Patricia Huston-Holm

Carmel Jenkins

Mary M. Jones

Joanne Katonak

Mary Jane Kaufman

Elaine Kern

Karyn Kern-Lazear

Janet Kidd

Idora Kimbro

Dr. Norma Kirby

Diana Kirkpatrick

Diana Klenk

Cynthy Kleman

Anna Knight

Virginia Koch

Michele Koenig

Stephanie Kogan

Katherine D. Kramer

JoAnn Krock

Nancy J. Kuder

Cheryl Kuhlman

Carane Ladd

Carol Lanrigan

Linda Lawwill

Cindy Lawyer

Florence (Becky) Leighty

Bonnie Lillibridge

Jane Link

Linda Lipp

Sue Loader

Mary Jo MacCracken

Rebecca Maggard

Darlene M. Malaska

Michele Maniskas

Judy McClanahan

John Edward McClendon

Mary Kathryn McClendon

Melodie McGee

Maggie McIntyre

Jodine McKinley

Marilyn McKnight

Nancy McKnight

Eileen McNally

Beverly McPherson

Carol Mealy

Jane E. Meese

John D. Meese

Patricia Miles

Carol Miller

Julia Ann Miller

Jane Modon

Betty M. Monahan

Shirley Moore

Jane Morner

Agnes (Aggie) Moynihan

Willa Mullins

Janet Munjas

Margaret Murph

Barbara Murray

Donna Mae Myers

Carola Neeley

Cindy Norman

Beatrice North

Phyllis A. Novy

Avanelle Oberlin

Jana Ogilvie

Kay Oughterson

Kathleen O’Malley

Patty Ondrus

Vicky Ottman

Linda Overstreet

Lori Paul

Kathleen Paulenich

Helen Payne

Stephanie Payne

Alice Penrose

Lauran Perrill

Bonita Pinkerman

Carol Pinney

Martha M. Poland

Linda Porteus

Barbara Pritts

Joyce Prochak

Anne Quinn

Joanne Rath

Carol J. Remington

Barb Rhinehart

Shirley Riggleman

Annie Roegner

Rush Coen Rogers

Sandra Royer

Linda Ruehrmund

Judith Ruen

Nancy Russell

Becky Sadowski

Linda Sauer

Julie Schieve

Jan Schoellman

Carol Schortgen

Ruth Scott

Carol Secoy

Virginia Shellhouse

Genny Sivula-Phillips

Linda Skillman

Barbara Skinner

Marilyn Slusser

Barbara Smith

Ellen Smith

June L. Smith

Loretta Smith

Vicki Jo Smith

Dr. Peggy Snow

Danielle Sobczyk

Cindy Speakman

Wendy Spoerr

Nadine Steele

Janet Stewart

Dorothy Strama

Laura Sullivan

Judy Szabo

Jacqueline Tasso

Sara Lou Teets

Kathy Teitelman

Cathy Tenney

Molly Tharp

Jackie Thase-Burch

Mildred L. Thomas

Rebecca L. Thomas

Gayla Thompson

Sue Thuma

Ann Todd

Janet Todd

Bonnie Trubee

Judy Valentine

Deborah L. VanArsdale

Mary Vasek

Marlene Vorherr

Carol Waddle

Altha Joyce J. Weinkam

Janice Weitzel

Pam Wendel

Cathy White

La Shell Williamson

Susan Wills

Dena Wilson

Pamela Wilson

Beverly Wittes

Linda Wood

Cindy Woods

Florence L. Woodward

Sandra Woodyard

Michelle I. Worthing

Linda Wright

Marian Zickerfoose

Barb Zirke

**OSO CHAPTER DONORS**

**2017-2020**

Alpha Alpha Iota Gamma Eta

Gamma Alpha Lambda Gamma Theta

Zeta Alpha Mu Gamma Iota

Theta Alpha Nu Gamma Lambda

Iota Alpha Xi Gamma Mu

Kappa Alpha Upsilon Gamma Nu

Lambda Alpha Phi Gamma Xi

Nu Rho Alpha Psi Gamma Pi

Pi Beta Gamma Gamma Rho

Sigma Beta Iota Gamma Upsilon

Tau Beta Lambda Gamma Phi

Upsilon Beta Nu Delta Zeta

Chi Beta Rho Delta Iota

Psi Beta Upsilon Delta Kappa

Alpha Gamma Beta Chi Delta Upsilon

Alpha Delta Beta Psi Delta Chi

Alpha Eta Gamma Alpha Delta Psi

Alpha Theta Gamma Delta Delta Omega

**ADDITIONAL DONORS**

**2017-2020**

Advisory Committee of OSO

DKG Ohio State Organization

Marietta Community Foundation

Toledo Area Coordinating Council

**APPENDIX A**

**ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION**

**July 1, 2020 – February 18, 2021 Revenue, Expenses and Assets by Fund**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Without Donor****Restriction** | **Educational Project**  | **International Studies** | **Leadership Development**  |
| **Assets as of July 1, 2020** | **1,899** | **6,786** | **200,634** | **30,091** |
| **Assets on February 18, 2021** | **7,353** | **6,941** | **212,966** | **32,878** |
| **Change in Value** | **5,454** | **155** | **12,232** | **2,787** |
| **Percentage**  | **75%** | **13%** | **16%** | **9%** |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Lifelong Learning** | **Scholarship Blanton** | **Scholarship Woodward** | **Student Teaching** | **Total** |
| **Assets as of July 1, 2020** | **59,878** | **78,459** | **153,014** | **94,842** | **625,603** |
| **Assets on February 18, 2021** | **63,245** | **82,770** | **152,451** | **100,798** | **659,402** |
| **Change in Value** | **3,367** | **4,311** | **-563** | **5,956** | **33,799** |
| **Percentage** | **6%** | **6%** | **-004%** | **6%** | **6%** |

**ADSOEF ASSETS BY FUND**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Without Donor****Restriction** | **Educational Project**  | **International Studies** | **Leadership Development**  |
| RBC Investments\* | 0 | 0 | 183,863 | 33,838 |
| US Bank Checking | 7,353 | 993 | 1,223 | -960 |
| US Bank Money Market | 0 | 5,948 | 2,359 | 0 |
| Huntington Bank Money Market | 0 | 0 | 25,521 | 0 |
| **Assets on February 18, 2021** | **7,353** | **6,941** | **212,966** | **32,878** |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Lifelong Learning** | **Scholarship Blanton** | **Scholarship Woodward** | **Student Teaching** | **Total** |
| RBC Investments\* | 44,744 | 52,626 | 153,700 | 91,375 | 560,146 |
| US Bank Checking | 739 | 838 | -1,249 | 4,592 | 13,529 |
| US Bank Money Market | 17,762 | 29,306 | 0 | 4,831 | 60,206 |
| Huntington Bank Money Market | 0 | 0 | 0 | 0 | 25,251 |
| **Assets on February 18, 2021** | **63,245** | **82,770** | **152,451** | **100,798** | **659,402** |

\*Revenue is deposited into US Bank checking. Expenses are paid from US Bank checking. Money market amounts can be transferred to US Bank checking as needed.

**July 1, 2020-February 18, 2021 Revenue, Expenses, and Assets by FUND**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Without** **Restriction** | **Educational Project**  | **International Studies Fund** | **Leadership Development**  |
| **Assets as of July 1, 2020** | **1,899** | **6,786** | **200,634** | **30,091** |
| **Revenue = $10,316** |  |  |  |  |
| Public Support and Contributions | 9,168 | 179 | 10 | 0 |
| Money Market Interest | 4 | 0 | 16 | 0 |
|  |  |  |  |  |
| **RBC Asset Value Change = $34,5428\*** |  |  |  |  |
| Investment Interest and Dividends | 0 | 0 | 1,519 | 282 |
| Gain (Loss) on Investment | 0 | 0 | 14,047 | 2,625 |
| **July 1 asset value +Revenue +RBC Value Change** | 11,071 | 6,965 | 216,226 | 32,998 |
| **EXPENSES = -$11,039** |  |  |  |  |
| Program Awards | 0 | 0 | -2,500 | 0 |
| Allocated Program Expenses | -50 | -22 | -696 | -110 |
| Direct Program Expenses | 0 | 0 | 0 | 0 |
| Fundraising Expenses | -71 | -2 | -64 | -10 |
| Operating Expenses | -3597 | 0 | 0 | 0 |
| **Revenue – Expenses = ($723)** |  |  |  |  |
| **Fund Assets on February 18, 2021** | **7,353** | **6,941** | **212,966** | **32,878** |
|  |  |  |  |  |
|  | **Lifelong Learning** | **Scholarship Blanton** | **Scholarship Woodward** | **Student Teaching** | **Total** |
| **Assets as of July 1, 2020** | **59,878** | **78,459** | **153,014** | **94,842** | **625,603** |
| **Revenue = $10,316** |  |  |  |  |  |
| Public Support and Contributions | 0 | 125 | 0 | 814 | 10,296 |
| Money Market Interest | 0 | 0 | 0 | 0 | 20 |
|  |  |  |  |  |  |
| **RBC Asset Value Change = $34,5428\*** |  |  |  |  |  |
| Investment Interest and Dividends | 373 | 435 | 9 | 759 | 3,377 |
| Gain (Loss) on Investment | 3,420 | 4,044 | 0 | 6,999 | 31,145 |
| **July 1 asset value +Revenue +RBC Value Change** | 63,671 | 83,073 | 153,013 | 103,414 | 670,441 |
| **EXPENSES = -$11,039** |  |  |  |  |  |
| Program Awards | -188 | 0 | 0 | -2,250 | -4,938 |
| Allocated Program Expenses | -218 | -277 | -524 | -336 | -2,233 |
| Direct Program Expenses | 0 | 0 | 0 | 0 | 0 |
| Fundraising Expenses | -20 | -26 | -48 | -30 | -271 |
| Operating Expenses | 0 | 0 | 0 | 0 | -3,597 |
| **Revenue – Expenses = ($723)** |  |  |  |  |  |
| **Fund Assets on February 18, 2021** | **63,245** | **82,770** | **152,451** | **100,798** | **659,402** |

\*Revenue is deposited into US Bank checking. Expenses are paid from US Bank checking. Money market amounts can be transferred to US Bank checking as needed.

***WHY IS ADSOEF A SOUND INVESTMENT?***

***No administrative fees!***

* *Your Directors have volunteered time, talents, and skills for a total of 13,869 hours since 2017 inception through December 2020.*
* *This is equivalent to $293,957.36 for a 3-year period using data from the Bureau of Labor Statistics. (20-21 not included)*
* *Not one penny of member donations is spent on salary or benefits.*

***Business expenses are kept to a minimum!***

* *Major expenses Accounting Fees, Business Registration Fees, Federal Taxes, Ohio Charitable Registration, and Insurance which totaled $3,797.00.*
* *Minor expenses are Contracted Services for Webmaster and The Voice Editor at $500.00 each annually.*
* *A bookkeeper’s position for this year was necessary due to treasurer transition. An OSO member’s donation is offsetting this expense.*
* *Minimal expenses are Postage, Supplies, and Mileage totaling $484.19 mostly relating to transfer of materials.*
* *$0.00 have been spent in Facilities and Equipment.*

***Programs are being supported!***

* *An International Scholarship totaling $2,500.00 and Grants totaling $2,250.00 have been awarded.*
* *$188.00 was given for Leadership Development.*
* *To date, $4,938.00 was applied to programs.*

***Investments are protected and sound!***

* *Your investments have been and will continue to be carefully monitored and wisely invested in order to fund programs near and dear to all OSO members who are all ADSOEF.*
* ***Even with the stock market’s negative trend last year,***
* ***ADSOEF recovered!***

**APPENDIX B**

**ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION**

**Corrected Copy March 15, 2021**

**Assets as of June 30, 2020**

|  |  |
| --- | --- |
| **A Margaret Boyd International Study** | **$200,634.00** |
| **Annie Webb Blanton Scholarship** |  **$78,459.00** |
| **Educational Project** |  **$6,786.00** |
| **Esther Strickland Student Teaching Grant** |  **$94,842.00** |
| **Florence Woodward Scholarship** | **$153,014.00** |
| **Leadership Development (Memorial)** |  **$30,091.00** |
| **Lifelong Learning (Biennial Seminar)** |  **$59,878.00** |
| **Without Restrictions** |  **$1,899.00** |
| **TOTAL** | **$625,603.00** |

**The error in the first listing was not understanding the following assets were ALREADY incorporated into the funds:**

|  |  |
| --- | --- |
| **Huntington National Bank #01651578184** |  **$25,495.16** |
| **US Bank Checking #1 301 2184 2533** |  **$12,543.24** |
| **US Bank Credit Card** |  **$139.14** |
| **US Bank Money Market #1 301 0084 3213** |  **$60,203.02** |

**Therefore, this is the new total assets and minimum disbursement.**

**TOTAL ASSETS $625,603.00**

**ADSOEF is a Private Foundation, so *“There is a requirement that a minimum 5% of asset holdings are distributed each year.”***

**Therefore, our disbursements would be a minimum of 5% of $625,623.00 which equals $31,282.00. The 2021-2022 budget will be prepared with that amount in mind.**

***Please accept our apology. ADSOEF Board of Directors***

**APPENDIX C**

**ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION**

**BUDGET 2021-2022**

|  |  |
| --- | --- |
| **REVENUE** |  |
| OSO Chapter Contributions | $ 4,000.00 |
| Direct Appeal |  8,000.00 |
| Individual Contributions |  2,500.00 |
| Investment Dividends and Interest |  10,000.00 |
| Transfer of OSO Scholarship Fee |  1,500.00 |
| Visa Rewards |  150.00 |
| Other Income (Money Market, Checking, etc.) |  8,865.00 |
| Convention Fundraiser |  750.00 |
|  **TOTAL REVENUE** | **$35,765.00** |
|  |  |
| **DISBURSEMENTS** |  |
| Accounting Fees (CPA) |  $ 3,000.00 |
| Insurance (Liability and Bond) ($290 + $75) |  356.00 |
| Ohio Charitable Registration (Attorney General) |  200.00 |
| Webmaster and Editor Contracts |  $1,000.00 |
| Ohio History Connection Donation |  50.00 |
| Postage, Printing, and Supplies |  800.00 |
| Mileage |  800.00 |
| Online QuickBooks and Fees |  300.00 |
| Marketing |  600.00 |
| Fundraising |  2,000.00 |
| Educational Projects |  2,000.00 |
| Leadership Development |  1,500.00 |
| Lifelong Learning |  200.00 |
| Federal Excise Taxes |  200.00 |
| Annual Meeting |  250.00 |
| A. Margaret Boyd International Study |  7,500.00 |
| Annie Webb Blanton Scholarship |  5,000.00 |
| Esther H. Strickland Student Teaching Grants |  10,000.00 |
|  **TOTAL DISBURSEMENTS** | **$35,765.00** |
|  |  |

Approved by ADSOEF Board of directors March 3, 2021.