

ALPHA DELTA STATE



**OHIO**

**EDUCATIONAL  
FOUNDATION**

# **FOUNDATION REPORT**

**2019 Ohio State Organization Convention**

# ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION BOARD OF DIRECTORS

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**ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION  
ANNUAL MEETING AGENDA  
Columbus, Ohio  
Polaris Hilton Hotel ≈ Polaris B & E  
April 5, 2019 ≈ 8:00 p.m.**

Call to Order	Dr. Norma Kirby, Chairman
Secretary's Report	Donna Myers, Secretary
Correspondence	Donna Myers, Secretary
Report of the Treasurer	Diana Haskell, Treasurer
Committee Reports	
Finance Committee	Betty Monahan, Chairman
Policies and Procedures Committee	Jane Meese, Chairman
Scholarship Committee	Marilyn Slusser, Chairman
Fundraising Committee	Jane Meese, Chairman
Leadership Committee	Donna Myers, Chairman
Biennial Seminar Report	Betsy Foreman, Biennial Seminar Coordinator
Unfinished Business	
New Business	
Election	OSO Nominations Committee
Announcements	
Adjournment	

These motions may be considered during the meeting:

- To adopt the 2019-2020 Budget

Joyce Jones-Weinkam, Gamma Xi, is serving as Parliamentarian

As stated in the ADSOEF Bylaws, Article IX: The rules contained in *Robert's Rules of Order Newly Revised* (current edition) shall govern ADSOEF proceedings.

<b>ACTIONS</b>	<b>OUTCOMES</b>
Approved a Direct Appeal Campaign to benefit the Educational Project Fund. Letters mailed to all ADSOEF members.	Thank you for your contributions! A complete report will be shared when the Direct Appeal ends on June 30, 2019.
Closed investment account with Horter Investment Management	Opened investment account with Royal Bank of Canada Wealth Management who manages investments for DKG Supporting Corporation and DKG Educational Foundation
Determined allocation formula to be applied to program expenses	Fairly assesses each program based on total value the percentage of expenses that fund pays
Increased mileage rate to \$0.30 per mile	Consistency in the mileage rate paid by International and OSO
Asked artists and donors to provide artistic works for "Gifts of HeART" raffle at OSO 2019 Convention	These donations celebrate the arts and provide management funding for ADSOEF. Enjoy!
Approved management of a gift from Florence L. Woodward to establish a scholarship in her name for OSO members' graduate study at Kent State University.	Thank you, Mrs. Woodward! Your gift provides a new opportunity for members to advance their credentials, teaching practices, and dreams
Awarded \$1,000 each to 10 student teachers during 2018-19 academic year from the Esther H. Strickland Student Teaching Grant Fund	Ten student teachers were able to focus more on their experience rather than on their tuition and expenses
Awarded an International Fellowship to Nominchimeg Davannayou for graduate study at Kent State University	Continue to foster A. Margaret Boyd's goal of better global relations, especially with the U.S. and foreign countries
Created an Individual/Classroom/Community Project application	Allows for greater impact in classrooms, chapters, and communities
Updated forms and applications posted on Website – <a href="http://adsoef.weebly.com">adsoef.weebly.com</a>	Ease in access of applications when applying for grants, scholarships, projects or to register for ADSOEF activities
Finalized arrangements, speakers, and activities for <i>It's So Cincinnati!</i> June 18-21, 2019	Biennial Seminar team is ready to welcome 100 members and guests to Blue Ash Embassy Suites. Have you registered?
Created an ADSOEF brochure	A quick reference tool describing opportunities available to all members and nonmembers
Directors signed the Conflict of Interest Policy Statement	Practice provides transparency when Directors make decisions
Developed and approved more than half of the policies and procedures necessary to address Board decisions and directives	Policies in place guide Board decisions. Continue the process of development of policies and procedures
Changed ADSOEF Bylaws to reflect the name change of Alpha Delta State Ohio to Ohio State Organization (OSO)	Maintain up-to-date document.
Developed a draft plan to review policies annually, and to re-sign Confidentiality and Conflict of Interest agreements	Directors, committees, and volunteers stay in touch with decisions, directives, ethics, and protections for all stakeholders
Supported OSO Chapter leaders attending Summer Leadership Training	OSO Chapter leaders prepared for the 2018-20 biennium
<b>ACTIONS</b>	<b>OUTCOMES</b>

## **ADSOEF CHAIRMAN'S REPORT**

All members of Ohio State Organization of The Delta Kappa Gamma Society International are members of Alpha Delta State Ohio Educational Foundation and can participate in, make motions, and vote at the Annual Meeting. Thank you for attending the second Annual Meeting and supporting your Foundation!

You can support ADSOEF by serving as a Director, volunteering to serve on a Foundation committee, attending the Annual Meeting, contributing to fundraisers, and encouraging others to participate in educational opportunities provided by ADSOEF. Please contact a Board Director if you are interested in serving on a Foundation committee. Committee assignments for 2019-21 will be made in July 2019.

ADSOEF maintains the following funds.

A. Margaret Boyd Overseas Study Fund  
Annie Webb Blanton Scholarship Fund  
Memorial Leadership Fund  
Florence L. Woodward Scholarship Fund

Esther H. Strickland Student Teaching Grant Fund  
Life-Long Learning Biennial Seminar Fund  
Individual/Classroom/Community Project Fund  
Without Donor Restriction Fund

Learn more about ADSOEF and keep up-to-date through the ADSOEF Website at [adsoef.weebly.com](http://adsoef.weebly.com), through the link on the OSO website, and through our Facebook page. Applications, policies, documents, forms and all-things ADSOEF can be accessed on the website.

ADSOEF Board Directors meet face-to-face, online, and in committees to conduct business. From July 1, 2018, to March 1, 2019, Board Directors volunteered 2,457 hours. This time includes attending Board meetings, completing research, creating policies/procedures/documents, attending committee meetings, and communicating with members and chapters.

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

## **ADSOEF HISTORY**

Alpha Delta State Ohio (now known as Ohio State Organization) was the originator of Alpha Delta State Ohio Educational Foundation. Members at the 2017 State Convention authorized the establishment of Alpha Delta State Ohio Educational Foundation. The A. Margaret Boyd Overseas Foundation was renamed Alpha Delta State Ohio Educational Foundation.

ADSOEF is recognized as a non-profit 501(c)(3) organization and began operation July 1, 2017. As a 501(c)(3) charity, ADSOEF provides funding for activities that support professional and personal growth of women educators in Ohio and promotes educational excellence for Ohio students.

ADSOEF is managed by seven elected Directors and three non-elected Directors from Ohio State Organization who serve four-year staggered terms. The first election was March 2017 at the State Convention General Session. The Board of Directors elect a Chairman, Vice-Chairman, and Secretary. The three non-elected Directors include the OSO President, the OSO Treasurer, and the OSO Immediate Past State President.

The official logo, a visual identity for Alpha Delta State Ohio Educational Foundation, was designed by Heather J. Storer, Alpha Chi Chapter, and was revealed at the 2018 Annual Meeting. ADSOEF Bylaws were approved at the 2018 Annual Meeting.

All members of OSO are also members of ADSOEF and no membership fee is required by ADSOEF.

## **ADSOEF COMMITTEE REPORTS**

### **BIENNIAL SEMINAR COMMITTEE**

The Biennial Seminar entitled “**It’s SO Cincinnati!**” will be held from **June 18-20, 2019**, in Cincinnati. Embassy Suites by Hilton in Blue Ash is the host hotel and is accessed easily from I-71 and I-75. Those who register and pay the \$150.00 fee to attend (if one of the first 100 to register) will be able to tour Carol Ann’s Carousel and hear how the animals were carved, tour the National Underground Railroad Freedom Center, view many of the famous sights of Cincinnati by bus, and visit the American Sign Museum. There will be speakers, entertainment, and of course, great food (all meals included in the price)!

Be sure to stop by the Biennial Seminar display during breaks at this year’s Convention. You can receive additional information and/or sign up for this educational and fun opportunity. Be one of the 100 to experience “It’s SO Cincinnati!” We think you will be glad you did.

### **COMMUNICATIONS/MARKETING COMMITTEE**

Board Directors have been cooperating to foster communication with Ohio State Organization chapters and members of ADSOEF through monthly articles in *The Voice*, chapter presentations, the ADSOEF Website, a link on Ohio State Organization Website, a presentation at the October 2018 Executive Board Meeting, acknowledgement of donations, activities at the OSO Convention, and the Annual Meeting.

### **FINANCE COMMITTEE**

The Finance Committee began fiscal year 2018-2019 by completing the Internal Financial Reconciliation of all ADSOEF Accounts. The resulting compilation was turned over to Sheldon Reder, CPA, for the annual Financial Review. All accounts were found to be in order. We also participated in a conference call, on Nov.13, 2018, with the CPA who prepared the IRS form 990-PF Return Summary, to insure all information was accurate and that we understood the Form and its purpose.

The Finance Committee recommended that we withdraw investment funds from Horter Investment Management, and at the Oct. 20, 2018, Board of Directors Meeting, the motion was approved. The Committee participated in a tele-conference with Dennis Hobbs Wealth Management, Royal Bank of Canada (the company that manages the investments of the DKG International Foundation and the DKG Texas State Foundation). As a result of the consultation, a motion was made and approved by the Board of Directors to invest the withdrawn funds in Dennis Hobbs Wealth Management.

Throughout the year, the Finance Committee has continued to work with the Policies and Procedures Committee to develop Financial and Funds Management Policies.

Recently we learned that ADSOEF would be receiving an endowment from Florence L. Woodward for Ohio members to pursue graduate study at Kent State University.

The proposed budget for fiscal year 2019-2020 was developed and will be presented at the Annual Meeting on April 5, 2019.

### **FUNDRAISING COMMITTEE**

Foundation Directors are involved in raising money to grow and sustain funding for our Foundation’s mission and purposes. Directors provide personal contributions as well as ideas for growing funds. They count on Foundation members to support them in this effort by participating in fundraisers, offering fundraising ideas, and contributing to Foundation funds. It costs money to govern and operate a nonprofit Foundation. Directors determine priorities; their decisions demonstrate good stewardship.

Member and non-member donors are respected, honored, and protected by directives as stated in several Board policies. We focus on establishing trust in Foundation governance and operations.

This fiscal year, the Committee launched an *Imagine* Direct Appeal to members to support the Educational Project Fund. At OSO Convention 2019, a raffle for “Gifts of HeART” will showcase the generosity of member-artists and donors. Proceeds will help with funds services, filing fees, contracted services, and operating expenses.

## **LEADERSHIP COMMITTEE**

The Leadership Committee supported chapter leaders during the 2019 Summer Leadership Training by paying for the lunches of the chapter leaders. Donna Myers and Bev Wittes will be giving a breakout session during the 2019 Ohio State Organization Convention titled Cats, Cats, Cats! The use of cats and their characters in children’s literature will be the focus of the session. The Committee has been collecting ideas for seminar topics and presenters. If you have topics and/or presenters that you would like the Foundation to pursue, please suggest these to the Committee.

## **POLICIES AND PROCEDURES COMMITTEE**

Policies and their accompanying procedures are developed to enable the Foundation to operate with a deliberate system of principles, to guide decisions, and to achieve rational and consistent outcomes. The Policies Committee works with the Board of Directors and Foundation committees to put Board decisions and guidelines in writing. Our policies address the Foundation’s mission and purposes, reflect our ethics and integrity, assign responsibilities, and inform current and future Board Directors. Further, our policies establish ADSOEF as a legitimate, transparent, and trustworthy organization in the nonprofit sector.

Approved Foundation policies are posted on the Foundation Website at [adsoef.weebly.com](http://adsoef.weebly.com). Feel free to review them and to contact the Board Chairman or the Policies Committee Chairman with input, questions, or concerns.

## **SCHOLARSHIP COMMITTEE**

The ADSOEF Scholarship Committee has had a very rewarding and successful year. All scholarship applications were revised, and a new individual/classroom/community project application was created and made available to members. Contact with all state supported universities was updated and twenty-three student teaching grant applications from seven of the thirteen universities were received.

We received a recipient for the A. Margaret Boyd Overseas Fellowship who is now studying at Kent State University.

Currently we are reviewing the Strickland applications, the project applications, and the Blanton, White and Grimes scholarship applications. These will be awarded at the OSO Convention. Throughout this year, we look forward to awarding more scholarships, revising applications as needed, and reviewing dossiers from Fulbright for A. Margaret Boyd. The generous contributions from our members help us with our purpose of providing funding to support professional and personal growth of educators.

**CONTRIBUTORS TO ADSOEF**  
**March 1, 2018 through February 28, 2019**

Your tax deductible contributions to ADSOEF have impacted  
education, educators, and students in Ohio communities.  
Thank you for your donations and support!

**Member Contributors**

Anonymous Donors  
Cathy Adams  
Janet Adams  
Barbara Ade  
Bonita Agawa  
Marilyn Allen  
Esther Alspaugh  
Ellen Andrews  
Margaret Archangel  
Beth Archer  
Lynn E. Arnott  
Mary Ann Augustyn  
Beverly Babbert  
Juanita Barber  
Reba Barney  
Marilyn Bauer  
Meier Bauer  
Jeanne Bennett  
Jo Ann Benseler  
Dorothy Blackburn  
Melody Blake  
Marlene Bolea  
Lena K. Bowman  
Nan Bretz  
Margaret (Peggy) Brooks  
Susan Brueggemeier  
Pamela Brunetti  
Pat Bruns  
Sharon Calhoun  
Mary A. Callahan  
Heather S. Campbell-Lieberman  
Nancy Canniff  
Deborah Canter  
Patricia Cermak  
Barbara Y. Cleveland  
Sue D. Cline  
Elizabeth (Betty) Collins  
La Rita Condon  
Jennifer Conkle  
Karen Dauer  
Darlene M. DePouw

Patti Dice  
Linda Diltz  
Mary Jo (Bunny) Doebling  
Karen Dombrowski  
Karen Dunn  
Sue Eades  
Bonnie Eyestone  
Mary Eyink  
Linda Falatic  
Jennifer Felker  
Fonda Fichthorn  
Debbie Frazier  
Geraldine Frechtling  
Norma J. Frederick  
Lizabeth Fresch  
Janet Gahn  
Katie Gantz  
Linda Geyer  
Sally Gillmore  
Nancy Glasgow  
Charlene Greene  
Cathy Greenleaf  
Louise M. Greenlee  
Janet Halter  
Edna Hansen  
Alice Harker  
Diana C. Haskell  
Debbie Hayes  
Laura Hayes  
Louann Henderson  
Pamela Henney  
Dorene Henschen  
Joanne Hepp  
Janet Hess  
Ruth Hogsten  
Nancy J. Hoover  
Cherisse Hopper  
Patricia Huston-Holm  
Carmel Jenkins  
Mary M. Jones  
Joanne Katonak  
Dr. Mary Jane Kaufman



Elaine Kern  
Janet Kidd  
Idora Kimbro  
Dr. Norma Kirby  
Cynthy Kleman  
Diana Klenk  
Michele Koenig  
Stephanie Kogan  
JoAnn Krock  
Nancy J. Kuder  
Carane Ladd  
Linda Lawwill  
Cindy Lawyer  
Karyn Kern-Lazear  
Florence (Becky) Leighty  
Bonnie Lillibridge  
Jane Link  
Linda Lipp  
Sue Loader  
Rebecca Maggard  
Darlene M. Malaska  
Judy McClanahan  
Mary Kathryn McClendon  
Melody McGee  
Maggie McIntyre  
Jodine McKinley  
Marilyn McKnight  
Eileen McNally  
Carol Mealy  
Jane E. Meese  
Carol Miller  
Elizabeth M. (Betty) Monahan  
Shirley Moore  
Jane Morner  
Agnes (Aggie) Moynihan  
Willa Mullins  
Janet Munjas  
Margaret Murph  
Barbara Murry  
Donna Mae Myers  
Carola Neeley  
Beatrice North  
Avanelle Oberlin  
Jane Ogilvie  
Kay Oughterson  
Linda Overstreet  
Lori Paul  
Helen Payne

Stephanie Payne  
Lauran Perrill  
Bonita Pinkerman  
Linda Porteus  
Barbara Pritts  
Joyce Prochak  
Anne Quinn  
Joanne Rath  
Carol J. Remington  
Barb Rhinehart  
Annie Roegner  
Rush Coen Rogers  
Sandra Royer  
Judith Ruen  
Julie Schieve  
Julie Schmidt  
Jan Schoellman  
Carolgene Schortgen  
Ruth Scott  
Carol Secoy  
Virginia Shellhouse  
Linda Skillman  
Marilyn Slusser  
Barbara Smith  
Ellen Smith  
Loretta Smith  
Vicki Jo Smith  
Dr. Peggy Snow  
Cindy Speakman  
Wendy Spoerr  
Dorothy Strama  
Jacqueline Tasso  
Sara Lou Teets  
Cathy Tenney  
Molly Tharp  
Mildred L. Thomas  
Gayla Thompson  
Ann Todd  
Janet Todd  
Judy Valentine  
Deborah L. VanArsdale  
Carol Waddle  
Altha Joyce J. Weinkam  
Pam Wendel  
La Shell Williamson  
Dena Wilson  
Linda Wood  
Florence L. Woodward

Sandra Woodyard  
Linda Wright  
Barb Zirke

**Ohio State Organization**

**Toledo Area Coordinating Council**

**Marietta Community Foundation**

**Chapter Contributors**

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

**Contributions *In Memory of***

Jean Becker  
Judith Cupp  
Carol Germond  
Barbara Grayson  
Earl L. Matthews  
Carol Soberano  
Kathryn Spillman  
Rosemary Thomas  
Wilma Van Camp  
Shirley Wightman  
Olive Woodyard  
Eileen Young

**Contributions *In Honor of***

Dorothy Blackburn  
Patricia Cermak  
Janet E. Edle  
Betsy Foreman  
Mary F. Hanna  
Gretchen McDaniel

**Alpha Delta State Ohio Educational Foundation  
Proposed Budget 2019-2020**

<b>Revenue</b>			Program	Strickland	Blanton		Education	International	Biennial	Total
	Unrestricted	Management	Allocated	Grants	Scholarship	Leadership	Projects	Studies	Seminar	
Chapter Contributions	300			2,000	50	50	50	50	0	2,500
Individual's Contributions	2,000			1,000	200	50	2,950	200	0	0
Rewards Credit Card	150									150
Interest	125									125
Blanton Scholarship	0				2,000					2000
<b>Total Revenue</b>	<b>2575</b>	<b>0</b>	<b>0</b>	<b>3000</b>	<b>2,250</b>	<b>100</b>	<b>3000</b>	<b>250</b>	<b>0</b>	<b>11175</b>
<b>Expenses</b>										
<b>Operating</b>										
CPA		3,500								3,500
Charitable Registration		100								100
Federal Taxes		75								75
Insurance		365								365
<b>Program</b>										
Postage and Supplies			300							300
Printing			200							200
Ohio History Connection			50							50
Mileage			2,000							2,000
Meetings			500							500
Marketing			350							350
Webmaster and Editor Contracts			1,000							1000
Treasurer Services			599							599
Blanton Scholarship					2,000					2,000
Strickland Grant				5,000						5,000
International Award								2,500		2,500
Biennial Seminar									0	0
Leadership Funding						3,000				3,000
Project Funding							3,000			3,000
<b>Total Expenses</b>	<b>0</b>	<b>4040</b>	<b>4999</b>	<b>5000</b>	<b>2000</b>	<b>3000</b>	<b>3000</b>	<b>2500</b>	<b>0</b>	<b>24539</b>

Alpha Delta State Ohio Educational Foundation  
Statement of Financial Activity and Position 07.01.18 - 02.15.19

	Admin	Allocated	W/O Donor	Strickland	Blanton	Lifelong	Leadership	Educational	International	Woodward
		to Programs	Restrictions	Grant	Scholarship	Learning	Fund	Projects	Studies	Scholarship
<b>Revenue</b>										
Chapter Contributions			300	742	43			300	50	0
Individual Contributions			750	19,502						150,000
Direct Appeal Mailing								5,738		
Interest			31						92	
Investment interest and dividends				368	211	180	136	0	738	
Investment Gains, Losses Expenses				-7,034	-4,046	-3,446	-2,602		-14,150	
Seminar Registration						1200				
<b>Total Revenue \$149,103</b>			1081	13,578	-3792	-2066	-2466	6038	-13270	150000
<b>Expenses</b>										
Fundraising Expenses								2931		
Contracts-accounting and honorarium	5,390	500							215	
Operations-postage, supplies, marketing		463				87			12	
Insurance	365									
Travel-mileage, lodging	6	1,377				71				
Program Services <b>\$13,142</b>				10,250	0	392	0	0	2,500	0
<b>Total Expenses \$24,559</b>	5761	2340		10250	0	550	0	2931	2727	0
Beginning Balance 07.01.18 <b>\$496,569</b>			4,269	93,013	79,922	67,032	32,920	840	218,573	0
Change in net assets <b>\$124,544</b>	-5761	-2,340	1,081	3,328	-3,792	-2,616	-2,466	3,107	-15,997	150,000
Balance 02.15.19 <b>\$621,113</b>	-5761	-2340	5,350	96,341	76,130	64,416	30,454	3947	202,576	150,000
Statement of Financial Position										
Checking <b>\$170,418</b>				13,042	3,784	0	0	3,592	0	150,000
Savings <b>\$85,430</b>	-5,761	-2,340	5,350	0	25,407	24,431	0	0	38,343	0
Investments <b>\$365,265</b>				83,299	46,939	39,985	30,454	355	164,233	0
Balance 02.15.19 <b>\$621,113</b>	-5761	-2340	5350	96,341	76,130	64416	30,454	3,947	202,576	150,000