

ALPHA DELTA STATE



**OHIO**

**EDUCATIONAL  
FOUNDATION**

# **FOUNDATION REPORT**

**2020 Ohio State Organization Convention**

**ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION**

## BOARD OF DIRECTORS

Meier Bauer, Gamma Phi, 2017-2021  
OSO Immediate Past President  
465 Woodlands Ridge Drive  
Cincinnati, Ohio 45238-5162  
Phone: 513-941-4461(h); 513-368-0286(m)  
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ADSOEF & OSO Treasurer  
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E-mail: DianaHaskell1@gmail.com

Dr. Norma Kirby, Alpha Delta, 2017-2021  
ADSOEF Board Secretary  
6310 State Route 41 NW  
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Diana Kirkpatrick, Alpha Delta, 2019-2021  
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ADSOEF Board Chairman  
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Marilyn Slusser, Delta Kappa, 2017-2021  
ADSOEF Board Vice-Chairman  
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## 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, originally organized in 1981, was renamed Alpha Delta State Ohio Educational Foundation.

Alpha Delta State Ohio Educational Foundation is recognized today 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 awarding scholarships, grants and fellowships for the professional and personal growth of educators.

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 President.

The official logo was designed by Heather J. Storer, Alpha Chi Chapter, and was first revealed at the 2018 Annual Meeting. ADSOEF Bylaws were approved at the 2018 Annual Meeting.

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.



**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**

Call to Order	Kathy McClendon, Chairman
Secretary's Report / Correspondence	Dr. Norma Kirby, Secretary
Treasurer's Report	Diana Haskell, Treasurer
Committee Reports	
Finance	Meier Bauer, Chairman
Governance	Karyn Kern-Lazear, Chairman
Nominating	Dr. Norma Kirby, Chairman
Fundraising	Sandy Royer, Chairman
Marketing	Jackie Thase-Burch, Chairman
Donor Relations	Betty Monahan, Chairman
Educational Services	Diana Haskell, Chairman
Scholarship	Marilyn Slusser, Chairman
Unfinished Business	
New Business	
Approval of 2020-2021 Budget	Meier Bauer, Finance Committee Chairman
Announcements	
2021 Elections	Dr. Norma Kirby, Nominating Committee Chairman
Adjournment	

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.

## RECIPIENTS OF ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION FUNDING

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

2018

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

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

### **Annie Webb Blanton Scholarship recipients:**

2019

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

### **A. M. Boyd Overseas Fellowship recipient:**

2018 - 2020

Nominchimeg Davannyam from Mongolia, studying at Kent State University

### **Project award recipients:**

2019

“Read to Succeed: Summer Reading Retention”  
Sue Thuma, Alpha Psi Chapter, Project Leader



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

### A MESSAGE FROM OUR CHAIRMAN

Thank you for attending the third Annual Meeting of ADSOEF and for supporting your Foundation! **Congratulations!** You are doing it! You are helping the Foundation meet our annual campaign goal of \$25,000! We are over one-fifth of the way there. Your generosity is much appreciated as we live out our mission to support educators focused on providing excellence in education.

One of the realities of life is that almost everyone can use a helping hand sooner or later. No one can pull him or herself up by the bootstraps. That just doesn't work! Through your Foundation you have been giving deserving educators that helping hand so they can help even more individuals achieve excellence in life through the power of education. That's what believing in Delta Kappa Gamma and belonging to this group of dedicated educators is all about – building the future!

Think of your Foundation as a construction company! You are an essential part of that company! You help to build the future in so many ways -- by serving as a Director or on a Foundation committee, volunteering as a Chapter Representative, contributing to fundraisers, encouraging sisters and others to apply for ADSOEF scholarships, grants, and fellowships, or by applying for these opportunities yourself. And how does that help "build the future of excellence in education" you ask?

Your Educational Services and Scholarship Committees study needs of educators, offer funding opportunities, evaluate applications, and propose awards to deserving educators. The Finance, Governance, and Nominating Committees develop financial, legal, and human resources to keep ADSOEF running efficiently, legally, and in good standing as a non-profit; while Fundraising, Marketing, and Donor Relations Committees focus on communication and positive interaction with all who support the Foundation. In the first seven months of the fiscal year, Directors volunteered an average one hour per person per day and Committee members added a combined total of eighty-four hours, meeting face-to-face and in GoToMeetings to conduct business, or using email and phone calls to carry on the work of the organization between meetings. Alpha Delta State Ohio Educational Foundation functions like an extended family and a construction company where great things are happening. Learn what the committees of this Foundation are doing and where you might fit in on the following pages of this report! Working together, we can accomplish much!

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.

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

Sincerely,

Kathy

Applications, policies, documents, forms and all-things ADSOEF can be accessed at [adsoef.weebly.com](http://adsoef.weebly.com)  
Visit "Alpha Delta State Ohio Educational Foundation" on Facebook.

## **ADSOEF COMMITTEE REPORTS**

**July 1, 2019 through Present**

### **DONOR RELATIONS COMMITTEE**

The primary focus of the Donor Relations Committee is to send timely acknowledgement and thanks to all donors for their generous contributions to ADSOEF. We are overjoyed to report that we have been quite busy writing and sending out those communications. We are striving to continue building your trust and confidence in our Foundation mission and goals. We strive to maintain accurate records of donations and ensure that funds are distributed as the donor has specified. We are grateful for your continued support, and look forward to meeting and talking with you during this Convention.

*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**

We welcome the opportunity to provide awards and financial support to those applying for funds from **Individual/Classroom/Community Project Fund, Leadership Development Fund and Lifelong Learning Fund**. Your committee members are eager to assist you or your Chapter to implement impact in your classroom or community. We encourage development and growth in leadership skills impacting the Society and Foundation. Interested in participating in lifelong learning opportunities? Your Foundation wants to hear from you!

*Diana Haskell (Gamma Phi), chairman; Meier Bauer (Gamma Phi); Karen Dunn (Alpha Psi); Jane Morner (Alpha Delta); Chris Snoddy (Alpha Lambda)*

### **FINANCE COMMITTEE**

The Finance Committee ensures that your Foundation is operating in a financially sustainable manner, preserving the trust of all stake holders and fulfilling the Foundation's mission and purposes. As a group of caring members, we like to be generous with our scholarships, grants, and other awards. However, it is crucial to be cautious in the amounts awarded in order to protect the principle of each fund and thus extend our giving into the future as well as to provide for the operation of the Foundation. During this fiscal year the Finance Committee has recommended a new CPA, met with her to clarify our goals, reviewed the 990-PF (tax form) and compilation summary for accuracy, monitored investment and cash accounts, and developed a proposed budget for 2020-2021. The committee will be reviewing financial policies and procedures of the Foundation and conducting an internal financial review to close out this fiscal year.

*Meier Bauer (Gamma Phi) chairman; Dr. Pam Anderson (Alpha Delta); Diana Haskell (Gamma Phi) Treasurer; Donna Myers (Kappa); Kathy J. Walker (Beta Psi)*

### **MARKETING COMMITTEE**

The Marketing Committee continues to work closely with the Fundraising Committee to support their efforts. A poster display was prepared for the Fall OSO meeting highlighting Foundation programs. A Facebook page has been created to promote awareness of ADSOEF and reached 274 people in December/January. At least one chapter has shared the page out to others. A new brochure updated from the Fall/Giving Tuesday campaign has been created for the spring convention. Two PowerPoint shows are being created to play during the 2020 OSO Convention. A banner displaying how the Foundation supports excellence in education is in the works.

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

## **FUNDRAISING COMMITTEE**

The most important work of the Fundraising Committee is to fund the Foundation program services, so awards may be made to deserving applicants. To this end we brainstorm ideas and determine activities, for example, the annual campaign with direct appeals, OSO Birthday Luncheon appeal, Foundation Raffle, Facebook's Giving Tuesday and requests for support from Ohio chapters and members. We develop action plans, utilizing coordination of appropriate and cost effective communication vehicles, conduct fundraising activities while gaining contributions from members and chapters, and evaluate and give recommendations for future philanthropic activities. We highly commend ADSOEF Chapter Representatives for being the Foundation's voice to members. Contributors make a tremendous difference in the lives of beneficiaries! We pledge to be honorable and trustworthy stewards of all your contributions. We value your input and welcome your ideas during this Convention.

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

## **GOVERNANCE COMMITTEE**

The Governance Committee's work concentrated on revising ADSOEF Bylaws so they would better serve the mission and work of the Foundation. To go along with the new Bylaws, the Committee also approved the policy/procedures for the Foundation's newly created Nominating Committee that will begin its work immediately. This committee will continue to support the creation and revision of the documents that govern ADSOEF.

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

## **SCHOLARSHIP COMMITTEE**

The Scholarship Committee revised and updated all scholarship applications and scholarship guidelines. The state supported universities were contacted regarding the Esther H. Strickland Student Teacher Grant and information was disseminated in early fall. The Committee received thirty (30) applications for the student teacher grants. After reading and ranking the applications, we selected ten (10) awardees. These will be announced at the OSO State Convention. The A. Margaret Boyd recipient, Nomin Davaanyam, was again supported. However, Nomin will not be attending the convention as she is expecting her second child in March. The Scholarship Committee wishes to thank all members for their continued contributions to the Alpha Delta State Ohio Educational Foundation.

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

## **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/ADSOEF. The Committee will present a slate of candidates for available Director positions at the Annual Meeting beginning in 2021, and each year thereafter. The committee has completed the ADSOEF Director Application and Description of Position; both are available on the Foundation website. Any member of Ohio State Organization/ADSOEF is eligible to serve as a Director of the Foundation. The Committee is looking forward to reviewing many applications from members interested in serving on the Foundation Board!

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

## **CONTRIBUTORS TO ADSoEF** **July 1, 2019 through February 15, 2020**

Your contributions to ADSoEF have impacted education, educators and students in Ohio communities.

### **Individual, Chapter, Group Contributors:**

Advisory Committee of Ohio State Organization  
Alpha Chapter  
Alpha Delta Chapter  
ANONYMOUS  
Meier Bauer  
Beta Lambda Chapter  
Beta Rho Chapter  
Dorothy Blackburn  
Marlene Bolea  
Margaret (Peggy) Brooks  
Richard Cannizarro  
Chi Chapter  
Karen Dauer  
Delta Iota Chapter  
Linda Diltz  
DKG Ohio State Organization  
Linda Falatic  
Gamma Delta Chapter  
Gamma Iota Chapter  
Gamma Pi Chapter  
Gamma Theta Chapter  
Diana Haskell  
Martha Henry  
Dr. Norma Kirby  
Carol Ladrigan  
Lambda Chapter  
Karyn Kern-Lazear  
Mary Kathryn McClendon  
Eileen McNally  
Jane E. Meese  
John D. Meese  
Betty Monahan  
Donna Myers  
Nu Rho Chapter  
Sandra Royer  
Barbara Smith  
Tau Chapter  
Ann Todd  
Zeta Chapter  
Barbara Zirke

### **Gifts In Kind – Foundation Raffle**

Sue Ayres of Pi  
Katie Gantz of Gamma Phi  
Sue Hagen of Pi  
Becky Molnar of Delta Kappa

### **Gifts Given in Honor or Memory of Others:**

#### **In Memory of . . .**

Molly Schiff  
Mary Lou Partee  
Ann Ramey  
by Beta Rho Chapter  
Fred Dishon  
by Carol Ladrigan  
Rosemary Thomas  
by Jane Meese  
Annette Jefferson  
by Betty Monahan

#### **In Honor of . . .**

Jane Meese  
by Richard Cannizarro  
by Mary Kathryn McClendon  
by John D. Meese  
Florence L. Woodward  
by Dr. Norma Kirby  
by Jane E. Meese  
Meier Bauer  
Pat Cermak  
Diana Haskell  
Dr. Norma Kirby  
Diana Kirkpatrick  
Karyn Kern-Lazear  
Donna Meyers  
Elizabeth Monahan  
Sandy Royer  
Michelle Schaffer  
Marilyn Slusser  
Jackie Thase-Burch  
by Mary Kathryn McClendon

### **Gifts In Kind – Foundation Raffle**

Beta Chapter  
Alpha Delta Chapter  
Alpha Xi Chapter  
Alpha Tau Chapter  
Alpha Upsilon Chapter  
Alpha Psi Chapter  
Alpha Omega Chapter  
Beta Eta Chapter  
Beta Kappa Chapter  
Beta Nu Chapter  
Gamma Rho Chapter  
Delta Kappa Chapter  
Delta Phi Chapter

*Thank you ALL !*