

**2022 Foundation Report**

**ADSOEF Annual Meeting**

**June 11, 2022**

**ADSOEF BOARD OF DIRECTORS**

Debra 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

BOD Chairman

Karyn Kern-Lazear, Gamma Phi, 2019-2023

Governance Committee Chairman

Nominating Committee Chairman

Judith Rank, Gamma Gamma

2021-2024, Director

Sandy Royer, Delta Kappa, 2019-2023

Fundraising Committee Chairman

Christine Snoddy, Alpha Lambda, 2021-2024

Educational Services Committee Chairman

Marilyn Slusser, Delta Kappa, 2021-2023

Board Vice Chairman, OSO Scholarship Committee Chairman

Jackie Thase-Burch, Alpha Upsilon, 2019-2023

Secretary, Marketing 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, and Secretary 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.

All members of OSO are also members of ADSOEF and can participate in the Annual meeting, serve on committees, 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.***

**A MESSAGE FROM OUR CHAIRMAN**

ADSOEF is your foundation! ADSOEF supports worthy educators and promotes excellence in education. Thank you for supporting the mission of ADSOEF with your time and generous contributions! You are making the world better for educators and children while touching the future of education in a positive way.

You can learn more about ADSOEF and keep up to date through the website at adsoef.org, the newsletter published on the fifteenth of each month, and through our Facebook page. Applications, policies, documents, forms, newsletters, and all-things ADSOEF can be accessed on the website.

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

Sincerely,

Dr. Norma Kirby

# **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**

**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**

**Dublin Embassy Suites**

**June 11, 2022 10:00 – 11:00 A.M.**

Call to Order and Meeting Guidelines

Approval of Minutes

Treasurer’s Report

Committee Reports

 Finance

 Fundraising

 Marketing

 Donor Relations

 Educational Services

1. Margaret Boyd Overseas

Governance

Nominating

Unfinished Business

New Business

Announcements

Adjournment

Dr. Norma Kirby, Chairman

Jackie Thase-Burch, Secretary

Dr. Lois Harkins, Treasurer

Millie Holzer, Chairman

Sandy Royer, Chairman

Jackie Thase-Burch, Chairman

Debra Frazier, Chairman

Christine Snoddy, Chairman

Marilyn Slusser, Chairman

Liaison to OSO Scholarship Committee

Karyn Kern-Lazear, Chairman

Karyn Kern-Lazear, Chairman

Dr. Norma Kirby, 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.

The meeting was recorded.



**ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION**

**MINUTES**

**2021 Annual Meeting via Zoom**

**April 8, 2021**

One hundred four members registered for the Annual Meeting. Eighty-three members which included ten Directors and one guest were in attendance for a total attendance of 84.

Vice Chairman Marilyn Slusser called the ADSOEF 2021 Annual Meeting to order at 7:07 p.m. and explained the guidelines for the Zoom meeting. OSO President Diana Kirkpatrick was the host for the meeting, Linda Diltz was cohost, and Webmaster Eileen McNally coordinated the visuals.

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.

**Revised Annual Meeting Agenda**

Without objection the Election of Directors was moved to follow the Nominating Committee report.

**Approval of Minutes**

The Minutes of the 2020 ADSOEF Annual Meeting were approved as electronically distributed.

**Treasurer’s Report**

Interim Treasurer Dr. Lois Harkins gave the Treasurer’s Report.

* Explained that she would be referring to pages 7 and 19-22 in the Annual Meeting Report.
* Explained the transition of treasurers.
* Reviewed the July 1, 2020 – February 18, 2021 report including revenue, expenses and assets by fund as presented in Appendix A of the 2021 Annual Meeting Foundation Report presenting examples of each.
* Explained why ADSOEF is a sound investment for donors.
* Reviewed the total ADSOEF assets as of June 30, 2020, totaling $625,603.00 as presented in appendix B of the Annual Meeting Report.
* Reviewed the detailed analysis of the revenue, expenses, and assets by fund.

The Treasurer’s Report was filed for record.

**Committee Reports**

Chairman M. Kathryn McClendon called for the ADSOEF Committee reports.

Millie Holzer, Finance Committee Chairman, gave the Committee report.

* The Finance Committee studied the Foundation finances to create a budget that could be easily understood.
* Explained that as a private foundation five percent of the ADSEOF asset holdings must be distributed annually.
* Presented the budget for July 1, 2021, through June 30, 2022, including revenues and disbursements as presented in Appendix C of the 2021 Annual Meeting Foundation Report.
* Reminded members that a budget is a guideline and will be reviewed throughout the year and revised if necessary.
* Reminded members that the work of the Foundation supports DKG purposes 3, 5,

and 6.

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

* The focus of the Fundraising Committee is funding the Foundation’s program services and completing activities to raise funds for those services.
* *“A Heart for All”* 2020-2021 campaign was a success and exceeded the goal. Sponsors provided a $2,500.00 match for the campaign.
* Fundraising is ongoing and donations are accepted at any time.
* Invited members to join the party and the tradition of giving at the OSO Convention Birthday non-Luncheon on April 10. A gift of $1,000.00 seed money will start the “sprout” growing for Birthday non-Luncheon donations.
* Expressed appreciation to Chapter Representatives for being the Foundation’s voice to members and to donors for supporting the Foundation mission.

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

* Shared the new website address: adsoef.org where you will find all of the Foundation information you may need.
* The Marketing Committee works cooperatively with the Fundraising Committee and created a donation card for members to use for donations.
* Encouraged members to visit and like the ADSOEF Facebook page.
* Information is kept up to date on the website and on Facebook; check both often.

Betty Monahan, Donor Relations Committee Chairman, gave the Committee report. During this “virtual” time the enthusiasm and support for ADSOEF was real. She expressed a sincere thank you from the Committee, Directors, and recipients highlighting that donors are the heart of the Foundation to help others reach their goals.

Chris Snoddy, Educational Services Committee Chairman, gave the Committee report.

* Emphasized creating change in our organization and in our communities.
* Explained that the Committee is responsible to promote and make awards for Lifelong Learning, Individual/Classroom/Community Projects, and Leadership.
* Applications can be submitted at any time. Applications and criteria are available on the Foundation website at adsoef.org
* Three Leadership awards were approved for two recipients. Diana Haskell received two awards and Meier Bauer received one award.
* Encouraged members to apply for awards for Lifelong Learning, Individual/Classroom/Community Projects, and Leadership online at adsoef.org.

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 and that a new scoring rubric was developed.
* Shared with members that Nominchimeg Davaanyam, 2019 A.M. Boyd Overseas Fellowship recipient, completed her work at Kent State University and has returned to Mongolia.
* Presented the ten 2021-2022 Esther H. Strickland student teacher grant recipients including their photos and the universities they attend.

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

* Introduced Gunel Alasgarova from Azerbaijan, the current A. Margaret Boyd Overseas fellowship recipient. Gunel is studying Evaluation, Measurement, Statistics and the Foundations of Leadership Administration at Kent State University. Gunel will receive an extension of $2,500.00 for the 2021-2022 school year. Gunel addressed the members telling about herself, family and work at Kent State. She expressed a heartfelt thank you to the members of ADSOEF for the support they are providing and the goodness they spread throughout the world.
* The Committee has received six dossiers for the A. M Boyd Overseas Fellowship that they will review for the 2021-22 school year.

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

* Bylaws and policies for ADSOEF can be found on the website at adsoef.org.
* Explained the Bylaws concerns that the Board addressed and subsequently revised including Article I, Section B; Article V, Section B, 7; and article V, Section C, 3.
* Explained that the governing documents are not stagnant and need to be continually reviewed as the Foundation continues to grow.
* Noted that the revised Bylaws are available on the website at adsoef.org.

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

* Explained the process of nominations for the position of director.
* Reminded members that the revised Director Application and Description of Position documents are available on the ADSOEF website.
* Introduced the seven director candidates submitted by the Nominating Committee.

**MOTION**

Dr. Norma Kirby: By direction of the ADSOEF Nominating Committee I move to approve the following members for the seven open positions 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

There were no nominations for director from the floor. Chairman McClendon declared that nominations were closed.

By acclamation Chairman McClendon declared that the candidates for ADSOEF Director were elected.

There was no unfinished business.

There was no new business.

Chairman McClendon thanked members for participating in the fourth Annual Meeting and to all who support the Foundation in so many different ways. The meeting was adjourned at 8:12 p.m.

Respectively submitted.

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Dr. Norma Kirby, Secretary M. Kathryn McClendon

**TREASURER’S REPORT**

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

* Connect and establish communication with US Bank in Logan, Ohio, Huntington Bank in Lancaster, Ohio, and Royal Bank of Canada in Austin, Texas.
* Establish a partnership with an Athens, Ohio area CPA who would provide QuickBooks advice, meet established deadlines, and be willing to consider a lower fee.
* Learn the mathematical formula to determine monthly and accumulative 5% amounts in order to meet the IRS non-profit status while funding ADSOEF projects and grants.
* Increase communication with ADSOEF donors and Fundraising Committee.
* Meet deadlines and needs of ADSOEF Finance Committee, chair, editor, and webmaster.
* Provide monthly reports to Board of Directors that includes revenue, expenditures, portfolio, and 5% update.

*Dr. Lois Harkins, Treasurer*

**ADSOEF COMMITTEE REPORTS**

**July 1, 2021 through Present**

**FINANCE COMMITTEE**

There are words in a song that say “What a difference a day makes.” Well, the Finance Committee is singing “What a difference a year makes!”

As was mentioned in last year’s report, one of the financial requirements of a Private Charitable Foundation is that “a minimum of 5% of asset holdings are distributed each year.” Dr. Lois Harkins, Treasurer, carefully monitored the Total Assets as well as the Income and Disbursements. Then using the total assets of each month, she averaged the total assets for the 2020 – 2021 fiscal year. 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.

With income from sound investments and generous donations, we continue to support the mission of ADSOEF and Purposes 3, 5, and 6 of The Delta Kappa Gamma Society International.

Thanks to the Committee for sharing their thoughts and expertise to carry out the various aspects of this work.

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

**FUNDRAISING COMMITTEE**

The most important focus of the Fundraising Committee is funding the Foundation’s program services. We organize, implement, and evaluate philanthropic activities. Electronic communications through *The Voice, ADSOEF Newsletter,* andsocial media (Facebook) keep members informed. This year contributions exceeded the goal of $8,400.00 for “Be the Spark…Light our Flame.” Contributions are still encouraged and accepted! Progress may be checked at any time by clicking on [www.adsoef.org](http://www.adsoef.org). Additionally, you may make your traditional gift to any fund during our OSO luncheon.

We are eternally grateful for the generosity of our OSO sisters AND chapters! As you read the stories of Foundation award recipients, you understand the educational impact your investments provide for students, teachers, and communities! 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; Beth Archer, Alpha Psi; Diane Brogan-Adams, Delta Kappa; Jackie Thase-Burch, Alpha Upsilon; Barb Zirke, Alpha Psi*

**MARKETING COMMITTEE**

The Marketing Committee continues to work with all committees, especially the Fundraising Committee. The Committee also participates in webinars for marketing/fundraising initiatives.

This year the paper and electronic donation forms were updated with a QR code to provide another convenient method of giving. The Marketing Committee also oversees the Facebook page (Alpha Delta State Ohio Educational Foundation) that provides another way to access information and stories pertaining to the work of ADSOEF. Like us on Facebook!

*Jackie Thase-Burch, Alpha Upsilon, Chairman; Laura Davis, Alpha Upsilon; Rebecca (Becky) Doak, Alpha Upsilon; Katie Gantz, Gamma Phi; Judy Rank, Gamma Gamma*

**DONOR RELATIONS COMMITTEE**

Starting in July 2021 through March 2022, 112 donations were received by ADSOEF. Tax letters were generated for each of these donations. One hundred sixty-eight personal thank you or acknowledgement notes have been written and mailed. These were for donations to ADSOEF from individuals, as well as chapters and some were anonymous. Many donations were in honor of another while some were in memory. Those who were honored received notes as well as families of those remembered in memory.

*Debra Frazier, Chairman, Beta Rho; Mary Ellen Hall, Beta Lambda; Dr. Norma Kirby, Alpha Delta; Diana Kirkpatrick, Alpha Delta*

**EDUCATIONAL SERVICES COMMITTEE**

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

Two grants from the **Lifelong Learning Fund** were given in June of 2021. First, the speaker fee was paid to Leila Kubesch for her three-part series, “Belong, Believe, and Build,” delivered via Zoom for the Biennial Seminar. Second, Kim Lewis (Delta Epsilon) was awarded a grant to take two graduate courses toward a possible master’s degree in the Director of Pupil Personnel Program at the University of the Cumberlands.

Five **Individual/Classroom/Community Fund** awards have been approved. Two were given in December 2021. Angie Stokes (Beta Eta) was granted money to help the Wayne Trace Robotics Club team to travel to Pittsburg, PA, to compete in a national competition. They used the grant to visit the Carnegie Museum of Art and Natural History and pay for two meals for the students. Also, Tracie Cowgill (Alpha Xi) was awarded a grant to buy wiggle stools for her reading intervention classroom, so her students can wiggle while staying seated and better focus their attention on learning.

In February 2022, two more classroom projects were funded. One grant helped Linda Graves (Delta Mu) and her colleagues purchase supplies to better equip a new sensory room at Groveport Elementary School. The other grant allowed Pam Todd (Alpha Iota) and a Title 1 teacher at Crestview Elementary install a sound wall made of buttons recorded with phonics sounds along with photos of mouths making the sound, so students can push the buttons and see and hear the correct sounds of letters.

In May 2022, Building STEM Skills by Building Circuits, a project for the Hocking Hills Children’s Museum, submitted by Kristen Stimmel, Alpha Xi Chapter, was approved.

This Committee’s members are eager to assist you or your chapter to implement projects impacting you, your classroom, school, or community. 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*

**GOVERNANCE COMMITTEE**

The Governance Committee has not been called upon by the Board or Foundation members to review any article/section of the Bylaws and/or any Policy or Procedure. Our Bylaws require that all Policies and Procedures be reviewed every two years. This process occurred prior to June 30, 2021, but did not include newly adopted documents that were approved by the Board of Directors during the 2019 – 2021 term. By studying the Policies and Procedures every two years, the Board feels confident that they are, along with the Bylaws, still relevant to the work of the Foundation. The next review process will begin by July 1, 2022, and be reported to the Board by the Governance Committee.

*Karyn Kern-Lazear, Gamma Phi, Chairman; Joyce Jones-Weinkam, Gamma Xi; Dr. Norma Kirby Alpha Delta; Kathy McClendon, Zeta*

**NOMINATING COMMITTEE**

The next election of Directors will occur prior to June 30, 2023. Unlike the election in 2021, five (5) names will be presented to the membership for election. Our Foundation’s elections will occur yearly; this permits the staggering of terms for the Directors with one-half of the Board being elected every year. The Bylaws require the Nominating Committee be composed of five (5) members, two of which will be selected by the Board with the other three (3) coming from the general membership. Christine (Chris) Snoddy and I have been selected by the Board for this work. If you are interested in serving on this committee, please contact either Chris or me. The goal is to have the membership of the Nominating Committee be diverse by having members from the different regions in the state. If you are contacted to consider working on the Nominating Committee, please take time to think about doing so. ADSOEF will continue to be strong and grow only if the members are willing to agree to work for the organization by being a director or agreeing to be on a committee.

*Karyn Kern-Lazear, Chairman, Gamma Phi*

**SCHOLARSHIP LIAISON REPORT**

The Alpha Delta State Ohio Educational Foundation Liaison is happy to report that the Foundation has had a very successful year. The Directors voted to grant ten (10) OSO Esther H. Strickland Student Teaching Grants. Many of the recipients’ student teaching stories have appeared in the Foundation newsletter.

The Foundation welcomed a new A. Margaret Boyd Fellowship recipient, Brenda Rojas, from Paraguay, who is studying at The Ohio State University. The Directors voted to grant an extension of study to Gunel Alasgrova, at Kent State University. Gunel will be graduating in May of 2022. These two recipients are extremely grateful for the Foundation’s support.

The Foundation wishes to thank all members, chapters, and non-members for their contributions. These gifts help the Foundation to fulfill its mission.

*Marilyn Slusser, Delta Kappa, Liaison, OSO Scholarship Committee Chairman*

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

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

2018-2019 2020-2021

Cadelyn Bell, Ohio University, Zanesville Megan Anderson, Wright State University

Whitney Bobo, Ohio University, Zanesville Emma Campbell, Miami University

Danielle Dunkle, Ohio University Zanesville Emily Crowe, Miami University

Amanda Fitz, Ohio University, Zanesville Daulton Faulder, The Ohio State University-Lima

Bailee Hosey, Ohio University, Zanesville Haley Garland, The Ohio State University-Lima

Halena King, University of Akron Chance Goolie, Ohio University-Eastern Campus

Annika Lykins, Wright State University Mary Piper, Miami University

Emily Mourer, Ohio University, Zanesville Sarah Redett, Miami University

Abby Wise, University of Akron Ryan Turrieta, Miami University

Vanessa Wooten, Ohio University, Zanesville Brynn Valentine, Ohio University-Zanesville

2019-2020 2021-2022

Jaimie Arnold, Wright State University Brooke Anderson, Shawnee State University

Matthew Blum, Ohio University, Athens Brooke Carver , Wright State University

Daniel Boecker, The Ohio State University, Lima Carley Derexson, Ohio University, Lancaster

Marie Dean, Bowling Green State University Alisha Jenkins, The Ohio State University, Newark

Stephanie Hunt, The University of Toledo Ross Kaufman, The Ohio State University, Lima

Keri Mootz, Ohio University, Southern Samantha Lowe, Ohio University, Lancaster

Dominique S. Shiple, The University of Toledo Megan Manning, Wright State University

Trevor Shockey, Wright State University Ashlynn Moore, Wright State University

Gregory Silcox, Bowling Green State University Michael Sweeney, Ohio University

Amy Silvestri, The University of Toledo 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 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

2021-2022

Brenda Rojas from Paraguay, studying at The Ohio State University

**Leadership award 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 recipients:**

Biennial Seminar Presenter Leila Kubesch - “Belong, Believe, and Build,” delivered via Zoom

Kim Lewis, Delta Epsilon, was awarded a grant to take two graduate courses investigating a

 possible master’s degree in the Director of Pupil Personnel Program at the University of the

 Cumberlands

**Project award recipients:**

2019- 2020

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

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 who Attend Groveport Elementary, Linda Graves, Delta Mu, Project

Leader

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

Building STEM Skills by Building Circuits, Hocking Hills Children’s Museum, Kristen Stimmel,

Alpha Xi, Project Leader

**DONORS**

**Individual, Chapter, In Honor of and In Memory of**

**January 1, 2021 through December 31, 2021**

**INDIVIDUAL DONORS**

Anonymous

Anonymous

Anonymous

Anonymous

Anonymous

Anonymous

Anonymous

Anonymous

Cathy Adams

Beth Archer

Jim and Jay Bahnsen

Marilyn Bauer

Patricia Beathard

Jeanne Bennett

Louise Bennet

Lona P. Bowman

Margaret Brooks

Holly Buente

Debby Canter

Patricia Cermak

Sandi Clawson

Jennifer Conkle

Kathryn Cryder

Karen Dauer

Andrea Dean

Linda Diltz

Rebecca Doak

Karen Dombrowski

Terri Duesing

Linda Falatic

Debbie Frazier

Norma Frederick

Katie Gantz

Linda Geyer

Charlene Greene

Alice Harker

Dr. Lois Harkins

Virginia Koch

Katherine Kramer

JoAnn Krock

Linda Lawwill

Cindy Lawyer

Kim Lewis

Bonnie Lillibridge

Sue Loader

Deborah Mihalik

Mary Kathryn McClendon

Eileen McNally

Jane Meese

Betty Monahan

Shirley Moore

Mary Morrison

Donna M. Myers

Janet Myles

Kathleen O’Malley

Patty Ondrus

Cynthia Overly

Linda Porteous

Sandra Procaccio

Sandy Royer

Linda Ruehrmund

Judith Ruen

Nancy Russell

Linda Sauer

Jan Scholellman

Marilyn Slusser

Ellen Smith

Cathy Tenney

Sue Thuma

Ann Todd

Patricia Truex

Judy Valentine

Karen Wellbaum

Sandra Woodyard

**CHAPTER DONORS**

Beta Chapter

Zeta Chapter

Kappa Chapter

Lambda Chapter

Pi Chapter

Sigma Chapter

Tau Chapter

Alpha Gamma Chapter

Alpha Delta Chapter

Alpha Zeta Chapter

Alpha Eta Chapter

Alpha Xi Chapter

Alpha Upsilon Chapter

Alpha Phi Chapter

Alpha Psi Chapter

Beta Gamma Chapter

Beta Eta Chapter

Beta Kappa Chapter

Beta Lambda Chapter

Beta Nu Chapter

Beta Upsilon Chapter

Beta Chi Chapter

Beta Psi Chapter

Gamma Eta Chapter

Gamma Iota Chapter

Gamma Mu Chapter

Gamma Nu Chapter

Gamma Xi Chapter

Gamma Pi Chapter

Gamma Upsilon Chapter

Delta Delta Chapter

Delta Iota Chapter

Delta Kappa Chapter

Delta Phi Chapter

Linda Harrison

Jo Ann Heil

Janet Hess

Millie Holzer

Janet Howson

Karyn Kern-Lazear

Dr. Norma Kirby

Diana Klenk

**IN HONOR OF**

Anonymous in honor of Alpha Delta State Ohio Educational Foundation Board of Directors

Anonymous in honor of the 80th birthday of Alpha Upsilon Chapter

Alpha Zeta in honor of Edna Hansen

Marilyn Bauer in honor of Ellen Andrews

Patricia Beathard in honor of Linda Diltz

Jeanne Bennett in honor of Joyce Atwood

Louise Bennet in honor of Florence L. Woodward

Patricia Cermak in honor of Barbara Smith

Linda Diltz in honor of Beta Rho Chapter

Rebecca Doak in honor of Alpha Upsilon’s 80th anniversary

Norma Frederick in honor of Donna Myers

Katie Gantz in honor of Nancy Arulf

Dr Lois Harkins in honor of Marian Kurner, Millie Holzer, Florence Woodward, Kathy

McClendon, and Marilyn Slusser

Dr. Lois Harkins in honor of Dr. Pam Anderson, Jane Houser, Mary Ann Chase, Linda Sauer,

and Chris Snoddy

Dr. Lois Harkins in honor of Meier Bauer, Karyn Kern-Lazear, Elizabeth Monahan, Sandy Royer,

and Jackie Thase-Burch

Dr. Lois Harkins in honor of Beth Archer, Patricia Cermak, Donna Myers, Barbara Smith, and

Dr. Mary Jane Kaufman

Dr. Lois Harkins in honor of Karyn Kern-Lazear, Betty Monahan, Jackie Thase-

Burch, Meier Bauer, and Sandy Royer

Dr. Lois Harkins in honor of Annie Roegner, Linda Harrison, and Edna Hansen

Linda Harrison in honor of Ethel Adams

Jo Ann Heil in honor of Delta Kappa Chapter’s 50th Anniversary

Karyn Kern-Lazear in honor of Diana Kirkpatrick, Kathy McClendon, and Betty Monahan

Dr. Norma Kirby in honor of Alice Craig

Dr. Norma Kirby in honor of Katie Gantz

Dr. Norma Kirby in honor of Marilyn Slusser

Diana Klenk in honor of Gamma Phi Chapter

Virginia Koch in honor of Diana Kirkpatrick

Jo Ann Krock in honor of Carol Berry

Mary Kathryn McClendon in honor of Laura Winkler and her Zeta Secret Sister’s birthday

Mary Kathryn McClendon in honor of Kathryn L. Smith

Mary Kathy McClendon in honor of Virginia Koch, Florence Woodward, Dr. Ruth Brooks,

Barbara Smith, Meier Bauer, and Dr. Norma Kirby

Betty Monahan in honor of Patricia Cermak, Debbie Frazier, Mary Ellen Hall, Dr. Norma Kirby,

and Mary Kathryn McClendon

Shirley Moore in honor of Barbara Cleveland and Dr. Ruth Brooks

Janet Myles in honor of Edna Hansen

Linda Porteous in honor of Beth Archer

Sandra Procaccio in honor of Kaitlin Nime

Sandy Royer in honor of veterans who are teachers

Linda Sauer in honor of Dr. Lois Harkins

Marilyn Slusser in honor of Cathy P. Daugherty

Cathy Tenney in honor of Diana Kirkpatrick

Cathy Tenney in honor of Dr. Norma Kirby

Karen Wellbaum in honor of Chelsea Skoien

**IN MEMORY OF**

Anonymous in memory of Debbie Reichelderfer

Alpha Zeta Chapter in memory of Jeannie M. Borland

Alpha Xi Chapter in memory of Elizabeth Ann Rolston and Paula K. Tucker

Beta Gamma Chapter in memory of Geraldine Wilson

Beta Lambda Chapter in memory of Irene Menghini, Elizabeth (Betty) Myer, and Marjorie Blair

Beta Nu Chapter in memory of Peggy Gentile, past chapter president

Beta Nu Chapter in memory of Mary Ann Rothe-Schulte

Beta Psi Chapter in memory of Karen Ruemping

Gamma Upsilon Chapter in memory of Janet Fenel

Beth Archer in memory of Sally Gillmore

Jim and Jay Bahnsen in memory of Pat Stetson

Debby Canter in memory of Helen Anderson

Karen Dombrowski in memory of Marleen McManus

Charlene Greene in memory of Wanda Neudorfer

Dr. Lois Harkins in memory of Sally Gillmore

Dr. Norma Kirby in memory of Sally Gillmore

Dr. Norma Kirby in memory of Nancy J. Harper

Cindy Lawyer in memory of Sally Gillmore

Sue Loader in memory of Mary Pollack and Marilyn Murphy

Mary Kathryn McClendon in memory of Lynette Hissong

Jane Meese in memory of Sally Gillmore

Jane Meese in memory of Elizabeth Ann Rolston and Paula K. Tucker

Jane Meese in memory of Bevan Barnett with his wife Mrs. Jaqueline Barnett

Deborah Mihalik in memory of 2020 Alpha Sigma Chapter deceased members

Betty Monahan in memory of Marjorie Blair and Elizabeth (Betty) Meyer

Betty Monahan in memory of Sally Ann Martin

Kathleen O’Malley in memory of Geraldine Wilson

Linda Ruehrmund in memory of Marjorie Bigham

Jan Schoellman in memory of Joyce Richardson

Ann Todd in memory of Sally Gillmore

Judy Valentine in memory of Eileen Young

**ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION TREASURER’S ANNUAL REPORT**

**July 1, 2021 through March 31, 2022**

**EXPENDITURES**

*Grants*

* A. Margaret Boyd-Kent & OSU-$7,500 (3)
* Esther H. Strickland-OSU, Ohio, Shawnee, State, & Wright State-$10,000 (10)

*Projects*

* Wiggle Chairs, Robotics Competition, Sensory
* Room, & Interactive Sound Wall-$1831 (4)

***TOTAL: $19,331***

*Business*

* AIM Insurance-Liability-$365
* Contracts-Editor & Webmaster-$750

 CPA-$750

* Ohio Attorney General Registration-$200
* IRS-Taxes-$102
* Technology-Zoom, IT, & Weebly-$288

*Board and Committee*

* Postage-Donor, Secretary & Treasurer-$343
* Mileage-Audit, Bank, Donor, & Govern-$300
* Fundraising-Printing, Postage, & Wands-$626
* Printing, & Supplies-Treasurer-$193

***TOTAL: $3,917***

**5% UPDATE**

Per non-profit status, ADSOEF is required to spend 5% of assets. If unable to meet this number, IRS is owed the difference. This amount is figured monthly and then averaged with prior months. Our range has been $33,635 to $34,073. As of March 31st, the average was $33,899. The Finance Committee and Board of Directors are carefully monitoring ex- pected expenditures and anticipated revenue in or- der to meet the difference. Our goal remains to fund educational excellence.

Please accept our sincere gratitude for your un- wavering financial support of all grants and pro- jects. It is a gracious gift you offer by honoring or remembering others while providing educational opportunities for others. **Thank you!**

**REVENUE**

*Public Support*

* OSO Chapter Before SPARK-$1,132
* Individual & Business Before SPARK-$2,171
* SPARK Campaign-**$9,439**

*(Funds supported: Strickland, Boyd, Scholar- ship, Lifelong Learning, Leadership, Educational Projects, & Woodward)*

***TOTAL: $12,742***

*Investments*

* Interest & Dividends-$11,626
* Gains-$103
* Advisor Fee-$2,997
* Change in Market Value- $12,879

***TOTAL: —$4,147***

***Due to the generous outpouring of public support totaling $12,742 and investment in- terest, dividends, and capital gains of***

***$11,729, ADSOEF is able to offset investment losses by $8,595.***

**PORTFOLIO**

* Royal Bank of Canada-$585,049
* Huntington Bank-$25,586
* US Bank Money Market-$60,213
* US Bank Checking & Credit Reward-$12,108

***TOTAL: $682,956***

*(Compared to 03/31/****2021:*** *$674,984)*

***(Difference in our favor of $7,972)***

**BUDGET**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Budget** | **Actual** | **Budget** | **Budget** | **Attorney** |
|   | **7/1/2021** | **2021** | **2022** |   |
|   | **1/26/2022** | **2022** | **2023** |   |
| **REVENUE** |   |   |   |   |
| OSO Chapter Contributions | 1,131.50 | 4,000 | 1,700 |   |
| Direct Appeal | 7,978.90 | 8,000 | 12,000 |   |
| Individual Contributions | 1,497.41 | 2,500 | 2,000 |   |
| \*RBC Investment, Dividends & Int. | 19,516.03 | 10,000 | 27,900 |   |
| Transfer OSO Scholarship | 0 | 1,500 | 1,325 |   |
| Other Income | 0 | 0 | 500 |   |
| Checking Balance, CD, MM Interest | 11,242.59 | 8,865 | 12,500 |   |
| Convention Fundraiser | 0 | 750 | 1,000 |   |
|   |   |   |   |   |
| **TOTAL REVENUE** | **41,366.43** | **35,765** | **58,925** |   |
|   |   |   |   |   |
| **DISBURSEMENTS** |   |   |   |   |
| Accounting Fees (CPA) | 750 | 3,000 | 750 |   |
| Insurance (Liability & Bond) | 365 | 365 | 365 |   |
| Ohio Charitable Registration | 200 | 200 | 200 |   |
| Web & Editor Contracts | 500 | 1,000 | 1,000 |   |
| Ohio History Connection Donation | 0 | 50 | 50 |   |
| Postage | 315.80 | 267 | 60 |   |
| Printing | 0 | 267 | 550 |   |
| Office Supplies | 26.79 | 266 | 225 |   |
| Mileage | 219.90 | 800 | 825 |   |
| Online QB's & IT Support | 70 | 150 | 100 |   |
| Zoom, Weebly, Domain, Constant Contact | 149.90 | 150 | 650 |   |
| Marketing | 0 | 600 | 800 |   |
| Fundraising | 626.12 | 2,000 | 2000 |   |
| Educational Projects | 831.02 | 2,000 | 2500 |   |
| Leadership Development | 0 | 1,500 | 850 |   |
| Lifelong Learning | 0 | 200 | 850 |   |
| Federal Excise Taxes | 102 | 200 | 100 |   |
|  |  |  |  |  |
| Annual Meeting | 0 | 250 | 500 |   |
| A.M. Boyd International Study | 7,500 | 7,500 | 13,000 |   |
| Blanton Scholarship | 0 | 5,000 | 1,500 |   |
| Woodward Scholarship | 0 | 0 | 4,500 |   |
| Strickland Grants | 10,000 | 10,000 | 15,000 |   |
| Banking-Safe Deposit Box | 0 | 0 | 50 |   |
| Donor Relations | 0 | 0 | 350 |   |
| Name Newsletter Contest | 0 | 0 | 150 |   |
|   |   |   |   |   |
|   | **21,656.53** | **35,765** | **46,925** |   |
|   |   |   |   |   |
| **Attorney Brundige Stein Case** |  |  | **58,925** | **Est. 12,000** |
| **Attorney Brundige Stein Case** |  |  | **66,925** | **Est. 20,000** |
|   |   |   |   |   |
| **TOTAL DISBURSEMENTS** |   | **35,765** |   |   |