

ALPHA DELTA STATE



**OHIO**  
**EDUCATIONAL**  
**FOUNDATION**

**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 <https://www.adsoef.org> 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**  
*ZOOM Meeting Room*  
**April 8, 2021 7:00 – 8:00 PM**

Call to Order and Meeting Guidelines

Kathy McClendon, Chairman

Approval of Minutes

Dr. Norma Kirby, Secretary

Treasurer's Report

Dr. Lois Harkins, Treasurer

Committee Reports

Finance

Millie Holzer, Chairman

Fundraising

Sandy Royer, Chairman

Marketing

Jackie Thase-Burch, Chairman

Donor Relations

Betty Monahan, Chairman

Educational Services

Christine Snoddy, Chairman

Scholarship

Marilyn Slusser, Chairman

Governance

Karyn Kern-Lazear, Chairman

Nominating

Dr. Norma Kirby, Chairman

Unfinished Business

New Business

ADSOEF Nominating Committee

Election of Directors

Announcements

Adjournment

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](http://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 [adsoef.weebly.com](http://adsoef.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](http://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](http://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.

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Dr. Norma Kirby, Secretary

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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](mailto: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 ASDOEF 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 1<sup>st</sup>, currently elected officers as well as newly elected incoming officers may vote.

The revised Bylaws document is on the ASDOEF 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.

ASDOEF 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. 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 Kolenko	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	Susan Chemas	Sherry Grimes
Cynthia Y. Acklin	Sandi Clawson	Janet Halter
Cathy Adams	Barbara S. Cleveland	Edna Hansen
Diane Brogan-Adams	Sue D. Cline	Alice Harker
Janet Adams	Elizabeth (Betty) Collins	Dr. Lois Harkins
Barbara Ade	La Rita Condon	Erica Harley
Nova Adkins	Jennifer Conkle	Linda Harrison
Bonita Agawa	Freda Cook	Diana C. Haskell
Marilyn Allen	Donna Cooper	Debbie Hayes
Esther Alspaugh	Connie Costello	Laura Haynes
Ellen Andrews	Kathryn Cryder	Louann Henderson
Margaret Archangel	Karen Dauer	Pamela Henney
Beth Archer	Janet Davidson	Martha Henry
Lynn E. Arnott	Loretta Davidson	Dorene Henschen
Laura Atherton	Andrea Dean	Joanne Hepp
Mary Ann Augustyn	Darlene M. Depouw	Janet Hess
Joan Avery	Patti Dice	Ruth Hogsten
Beverly Babbert	Linda Diltz	Cherisse Hopper
Jay Bahnsen	Judy Dixon	Nancy J. Hoover
Juanita Barber	Rebecca Doak	Jane Houser
Reba Barney	Mary Jo (Bunny) Doebling	Patricia Huston-Holm
Deborah Berry	Karen Dombrowski	Carmel Jenkins
Kathie Bates	Terri Duesing	Mary M. Jones
Marilyn Bauer	Karen Dunn	Joanne Katonak
Meier H. Bauer	Sue Eades	Mary Jane Kaufman
Kathryn Behm	Janice Eddey	Elaine Kern
Jeanne Bennett	Karen Estridge	Karyn Kern-Lazear
Jo Ann Benseler	Bonnie Eyestone	Janet Kidd
Karen Bernard	Mary Eyink	Idora Kimbro
Dorothy Blackburn	Linda Falatic	Dr. Norma Kirby
Melody Blake	Pat Farrenkopf	Diana Kirkpatrick
Marlene Bolea	Pam Feick	Diana Klenk
Joan Bostelman	Jennifer Felker	Cynthia Kleman
Lena K. Bowman	Ann Fetrow	Anna Knight
Lona Pierson Bowman	Fonda Fichthorn	Virginia Koch
Nan Bretz	Debbie Frazier	Michele Koenig
Margaret (Peggy) Brooks	Geraldine Frechtling	Stephanie Kogan
Susan Brueggemeier	Norma J. Frederick	Katherine D. Kramer
Pamela Brunetti	Lizabeth Fresch	JoAnn Krock
Pat Bruns	Janet Gahn	Nancy J. Kuder
Sara A. Burky	Katie Gantz	Cheryl Kuhlman
Sharon Calhoun	Susan Garretson	Carane Ladd
Mary A. Callahan	Linda Geyer	Carol Lanigan
Heather Campbell-Lieberman	Sally Gillmore	Linda Lawwill
Nancy Canniff	Nancy Glasgow	Cindy Lawyer
Richard Cannizzaro	Barri Grandey	Florence (Becky) Leighty
Deborah Canter	Charlene Greene	Bonnie Lillibridge
Brenda Ceplecci	Cathy Greenleaf	Jane Link
Patricia Cermak	M. Louise Greenlee	Linda Lipp
Lois Chandler	Claudia Grimes	Sue Loader

Mary Jo MacCracken	Alice Penrose	Jacqueline Tasso
Rebecca Maggard	Lauran Perrill	Sara Lou Teets
Darlene M. Malaska	Bonita Pinkerman	Kathy Teitelman
Michele Maniskas	Carol Pinney	Cathy Tenney
Judy McClanahan	Martha M. Poland	Molly Tharp
John Edward McClendon	Linda Porteus	Jackie Thase-Burch
Mary Kathryn McClendon	Barbara Pritts	Mildred L. Thomas
Melodie McGee	Joyce Prochak	Rebecca L. Thomas
Maggie McIntyre	Anne Quinn	Gayla Thompson
Jodine McKinley	Joanne Rath	Sue Thuma
Marilyn McKnight	Carol J. Remington	Ann Todd
Nancy McKnight	Barb Rhinehart	Janet Todd
Eileen McNally	Shirley Riggleman	Bonnie Trubee
Beverly McPherson	Annie Roegner	Judy Valentine
Carol Mealy	Rush Coen Rogers	Deborah L. VanArsdale
Jane E. Meese	Sandra Royer	Mary Vasek
John D. Meese	Linda Ruehrmund	Marlene Vorherr
Patricia Miles	Judith Ruen	Carol Waddle
Carol Miller	Nancy Russell	Altha Joyce J. Weinkam
Julia Ann Miller	Becky Sadowski	Janice Weitzel
Jane Modon	Linda Sauer	Pam Wendel
Betty M. Monahan	Julie Schieve	Cathy White
Shirley Moore	Jan Schoellman	La Shell Williamson
Jane Morner	Carol Schortgen	Susan Wills
Agnes (Aggie) Moynihan	Ruth Scott	Dena Wilson
Willa Mullins	Carol Secoy	Pamela Wilson
Janet Munjas	Virginia Shellhouse	Beverly Wittes
Margaret Murph	Genny Sivula-Phillips	Linda Wood
Barbara Murray	Linda Skillman	Cindy Woods
Donna Mae Myers	Barbara Skinner	Florence L. Woodward
Carola Neeley	Marilyn Slusser	Sandra Woodyard
Cindy Norman	Barbara Smith	Michelle I. Worthing
Beatrice North	Ellen Smith	Linda Wright
Phyllis A. Novy	June L. Smith	Marian Zickerfoose
Avanelle Oberlin	Loretta Smith	Barb Zirke
Jana Ogilvie	Vicki Jo Smith	
Kay Oughterson	Dr. Peggy Snow	
Kathleen O'Malley	Danielle Sobczyk	
Patty Ondrus	Cindy Speakman	
Vicky Ottman	Wendy Spoerr	
Linda Overstreet	Nadine Steele	
Lori Paul	Janet Stewart	
Kathleen Paulenich	Dorothy Strama	
Helen Payne	Laura Sullivan	
Stephanie Payne	Judy Szabo	

## **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
<b>Assets on February 18, 2021</b>	<b>7,353</b>	<b>6,941</b>	<b>212,966</b>	<b>32,878</b>

	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
<b>Assets on February 18, 2021</b>	<b>63,245</b>	<b>82,770</b>	<b>152,451</b>	<b>100,798</b>	<b>659,402</b>

\*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	
<b>Assets as of July 1, 2020</b>	<b>1,899</b>	<b>6,786</b>	<b>200,634</b>	<b>30,091</b>	
<b>Revenue = \$10,316</b>					
Public Support and Contributions	9,168	179	10	0	
Money Market Interest	4	0	16	0	
<b>RBC Asset Value Change = \$34,5428*</b>					
Investment Interest and Dividends	0	0	1,519	282	
Gain (Loss) on Investment	0	0	14,047	2,625	
<b>July 1 asset value +Revenue +RBC Value Change</b>	<b>11,071</b>	<b>6,965</b>	<b>216,226</b>	<b>32,998</b>	
<b>EXPENSES = -\$11,039</b>					
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	
<b>Revenue – Expenses = (\$723)</b>					
<b>Fund Assets on February 18, 2021</b>	<b>7,353</b>	<b>6,941</b>	<b>212,966</b>	<b>32,878</b>	
	Lifelong Learning	Scholarship Blanton	Scholarship Woodward	Student Teaching	Total
<b>Assets as of July 1, 2020</b>	<b>59,878</b>	<b>78,459</b>	<b>153,014</b>	<b>94,842</b>	<b>625,603</b>
<b>Revenue = \$10,316</b>					
Public Support and Contributions	0	125	0	814	10,296
Money Market Interest	0	0	0	0	20
<b>RBC Asset Value Change = \$34,5428*</b>					
Investment Interest and Dividends	373	435	9	759	3,377
Gain (Loss) on Investment	3,420	4,044	0	6,999	31,145
<b>July 1 asset value +Revenue +RBC Value Change</b>	<b>63,671</b>	<b>83,073</b>	<b>153,013</b>	<b>103,414</b>	<b>670,441</b>
<b>EXPENSES = -\$11,039</b>					
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
<b>Revenue – Expenses = (\$723)</b>					
<b>Fund Assets on February 18, 2021</b>	<b>63,245</b>	<b>82,770</b>	<b>152,451</b>	<b>100,798</b>	<b>659,402</b>

\*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
<b>TOTAL</b>	<b>\$625,603.00</b>

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

<b>REVENUE</b>	
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
<b>TOTAL REVENUE</b>	<b>\$35,765.00</b>
<b>DISBURSEMENTS</b>	
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
<b>TOTAL DISBURSEMENTS</b>	<b>\$35,765.00</b>

Approved by ADSOEF Board of directors March 3, 2021.