Alpha Omicron Pi Foundation’s
2015 - 2016
Investment Report
This is our story.

We all have an AOII story to tell. Our story to share with you this year is one of success, but mainly gratitude, for your investment in Alpha Omicron Pi. Throughout the following pages, you will see how your gifts changed lives, Secured the Future for generations to come and made it possible for AOII to flourish. Your gifts made this year's stories of success possible.

These stories include leadership opportunities for our collegians and alumnae, lives forever impacted from Ruby Fund assistance for sisters in their greatest time of need, support for our philanthropic commitment to arthritis and scholarships for our members' educational success. You made it possible for the Foundation to grant $145,000 to the Fraternity for leadership development, funding for the Educational Leadership Consultant (ELC) program and training, alumnae and adviser training, Leadership Academy scholarships and programming and preservation of our archives for the 2016-17 year.

Additionally, our chapters and alumnae joined together to Strike Out Arthritis! with $443,136 raised for arthritis programs and research initiatives. More Academic Scholarships than ever before were awarded with 1 in 3 applicants receiving a scholarship. Our story has a happy ending, because your gifts awarded $833,902 in 2015-16.

The story of our Loyalty Fund continues to inspire. Gifts to the Loyalty Fund ensure the ongoing success of Alpha Omicron Pi for generations to come through the power and strength of our sisterhood, your generosity and our collective impact. Many of you have already joined the 1897 Society with an annual contribution to the Loyalty Fund of $1,897, and for those of you who haven’t yet, we hope you’ll seize the opportunity before the end of the fiscal year on June 30. Your gifts could write even more stories next year.

In the interest of stewarding even more of your dollars towards program support, the Donor Listing traditionally listed within this report can be found on our website at aoiifoundation.org. Together, we’re sharing the story of Alpha Omicron Pi each and every day, with each and every gift. For in the end, this isn’t about what you gave or even dollars granted; it’s about investing in our values, our sisters and our Fraternity. We’re honored to share this investment report with you, as we reflect on the stories of today and the shared vision for our sisterhood tomorrow.

Everyone has an AOII story. What’s yours?

Roses,

Koren Phillips  Kristen Prichard Ryan
AOII Foundation President  AOII Foundation Executive Director
Phi Chi  Rho Omicron
Total Awarded in Grants for 2015-2016:
$833,902
Arthritis (54%)
Scholarships (24%)
Educational Grants (16%)
Ruby Fund (6%)

Ruby Fund: 14 recipients= $51,266 awarded
27% increase in Ruby Fund Grants

Educational Grants: $145,000
Fraternity programs funded for 2016-17:
Educational Leadership Consultants (ELC) Program & Training
Leadership Academy 2017 Scholarships and Programming
Fulfilling the Promise: Adviser & Online Training
Training Ambassadors Program
Fraternity Arthritis Foundation Partnership
Preservation of Archives and Technology Convention 2017 Programming

Arthritis: $443,136
Funded regional camps,
Juvenile Arthritis programs,
National Backpack Program and research

Scholarships: 1 in 3 applicants awarded a scholarship
70 Scholarships Awarded= $194,500
5 New Named Scholarships Launched

Create your Story of Giving through Launching a Named Scholarship

Step 1: Complete a Named Scholarship Questionnaire, determining the scholarship criteria and eligibility.
Step 2: Decide on how your scholarship will be funded:
Option 1: Make an initial cash* contribution of at least $5,000 and agree to contribute additional funds over the next five years, for a minimum of $25,000. (Initial contributions must be made by October 1 of each year in order to award a scholarship the following spring).
Option 2: Launch the scholarship with a cash* gift of $25,000.

*Cash may also refer to donations of stock or other cash equivalents.

Finalize your commitment by signing a Scholarship Gift Agreement that has been customized to fulfill the intent of your scholarship.

The AOII Foundation Scholarship Committee selects a recipient based upon the criteria you have specified.

AOII-funded backpack from the National Backpack Program
Foundation Board of Directors

Koren Phillips  
Phi Chi, President

Judy Flessner  
Iota, Treasurer

Linda Grandolfo  
Nu Iota, Secretary

Andrea Dill  
Chi Psi, Director

Kathy Jensen  
Theta Omega, Director

Michelle Lopez  
Delta Theta, Director

Dionn Tron  
Omega, Director

Gayle Fitzpatrick  
Alpha Rho, International President

Foundation Staff

Kristie Prichard Ryan, CFRE  
Rho Omicron, Executive Director

Courtney Stafford  
Chi Omega Fraternity, Director of Advancement

Jana Adkins  
Rho Omicron, Director of Donor Relations

Laura Ward,  
Nu Omicron, Controller

Sydney Talley  
Rho Delta, Program Manager
Financial Report

Balance Sheet
Cash and cash equivalents $867,115
Marketable Securities $5,920,134
Receivables   $293,687
Fixed assets   $4,369
Total Assets   $7,085,305
Liabilities   $861,966
Total Net Assets $6,223,339
Total Net Assets and Liabilities $7,085,305

Financial data for the Alpha Omicron Pi Foundation as of and for the fiscal year ended June 30, 2016. Data presented is audited.

Revenue
- TOTAL REVENUE: $1,483,105
  - $55,330 RUBY FUND GIFTS 4%
  - $65,330 RUBY FUND GIFTS 7%
  - $102,335 GIFTS TO SCHOLARSHIP FUNDS 7%
  - $340,702 INVESTMENT INCOME 23%
  - $440,944 ARTHRITIS FUND GIFTS 30%
  - $543,794 LOYALTY FUND GIFTS 36%

Expenses
- TOTAL EXPENSES: $1,532,089
  - $500,300 ARTHRITIS GRANTS 33%
  - $349,518 FUNDRAISING EXPENSES 23%
  - $263,210 GENERAL & OPERATING EXPENSES 17%
  - $193,663 SCHOLARSHIPS 13%
  - $145,000 FOUNDATION-FUNDED FRATERNITY GRANTS 9%
  - $46,579 RUBY FUND GRANTS 3%
  - $33,819 GENERAL PROGRAM EXPENSES 2%
  - $500,300 ARTHRITIS GRANTS 33%
Scholarship Recipients

2015-2016

NAMED SCHOLARSHIPS

UNDERGRADUATE RECIPIENTS

Alpha Tau Chapter Scholarship
Amanda Segars, Zeta Pi
University of Alabama at Birmingham

Amy Ziegler Bettencourt Scholarship
Kimberly Younger, Lambda Beta
California State University Long Beach

Angels of Kappa Theta Memorial Scholarship
Jane Sorkin, Sigma Phi
California State University Northridge

Barbara Hiss Bruning Scholarship
Teghan Dodds, Lambda Epsilon
University of Waterloo

Beverly Landes Townsend Scholarship
Emily Christaena, Alpha Phi
Montana State University

Candy Carlisle Derivaux Memorial Scholarship
Summer Wixley, Nu Beta
University of Mississippi

Carey Griner Memorial Scholarship
Tanasia Jackson, Kappa Kappa
Ball State University

Carole Jurekna Jones Scholarship
Ginny Hayes, Alpha Delta
University of Alabama

Caroline Craig Lazzara Scholarship
Kylie Davis, Beta Chi
Kentucky Wesleyan College

Carolyn Huey Harris Scholarship
Kathleen Sattele, Lambda Sigma
University of Georgia

Charlene M. Favre Scholarship
Allison Etzel, Kappa Tau
Southeastern Louisiana University

Clara Jane Marchese Memorial Scholarship
Shelley Riegleman, Phi Lambda
Youngstown State University

Delta Chapter Centennial Scholarship
Julia Turock, Delta
Tufts University

Dina D’Geralamo Scholarship
Taylor Drude, Kappa Tau
Southeastern Louisiana University

Gayle Fitzpatrick Scholarship
Emily Olsen, Alpha Rho
Oregon State University

Ginger Banks Scholarship
Cristy Gandara, Omega Sigma
Oklahoma State University

Iota Chapter Scholarship
Megan Bartimoccia, Iota
University of Illinois

Jasmine Queen Scholarship
Laura King, Sigma Tau
Washington University

Jo Ann Gibbons Memorial Scholarship
Kandise Mahoney, Kappa Alpha
Indiana State University

Joleen Heibert Fields Scholarship
Amanda Hobson, Delta Omega
Murray State University

Kappa Gamma Chapter Scholarship
Jessica Stine, Kappa Gamma
Florida Southern College

Karen Fried Kelone “Healing Hand” Scholarship
Ellen Cook, Lambda Tau
University of Louisiana at Monroe

Karen Tucker Centennial Scholarship
Lauren Fitch, Omega Sigma
Oklahoma State University

Keri Keith Memorial Scholarship
Nikki Recchia, Gamma Sigma
Georgia State University

Langston/Purdy Scholarship
Emma Sachs, Alpha Delta
University of Alabama

Lauren Weis Memorial Scholarship
Denise Nguyenphu, Gamma Omicron
University of Florida

Lauren Weis Memorial Scholarship
Allena Smith, Alpha Pi
Florida State University

Lauren Weis Memorial Scholarship
Kaylee Hartman, Alpha Pi
Florida State University

Lauren Weis Memorial Scholarship
Cecil Ehrler, Alpha Pi
Florida State University

Legacy of Loyalty to Lambda Tau Scholarship
Hattie Thibodeaux, Lambda Tau
University of Louisiana at Monroe

Lou Meggness Coach Scholarship
Jordan Moore, Sigma Omicron
Arkansas State University

Martha McKinney Willhoeft Scholarship
Lauren Miller, Delta Xi
RaseHulman Institute of Technology

Muriel T. McKinney Scholarship
Brooke Stokes, Omega Sigma
Oklahoma State University

Nu Iota Chapter Scholarship
Olivia Williams, Rho Delta
Sanford University

Peg Crawford Scholarship
Alexandra Perez-Garcia, Phi Chi
University of Chicago

Phyllis Castoe Gilson Scholarship
Destini Blunt, Sigma Phi
California State University Northridge

Pi Kappa Chapter Scholarship
Zuleica O’Leary, Upsilon Lambda
University of Texas, San Antonio

Rachel Allen Scholarship
Madison Preece, Alpha Chi
Western Kentucky University

Rho Chapter Scholarship
Melanie Pratt, Epsilon Alpha
Pennsylvania State University

Rho Omicron Chapter Scholarship
Ashley Johnson, Rho Omicron
Middle Tennessee State University

Robert and Eleanor MacCurdy Scholarship
Corey Saller, Delta Kappa
Washington University

Sabrina Keene Scholarship
Kathleen Gwilliam, Gamma Alpha
George Mason University

Shirley A. Lee Memorial Scholarship
Carley Pizzi, Beta Zeta
Kennesaw State University

GRADUATE RECIPIENTS

Alumnae Chapter Honor Scholarship
Amanda Heedram, Alpha Phi
Montana State University

Barbara Kohler Scholarship
Sarah Eichenberg, Tau
University of Minnesota

Dottie Leek Nu Omicron Chapter Scholarship
Carol Spangler, Nu Omicron
Vanderbilt University

Edith Huntington Anderson Scholarship
Kathryn Schollens, Lambda Eta
Grand Valley State University

Helen Halleh Scholarship
Rachel Bray, Delta Tau
University of Alabama Huntsville

Iota Sigma Endowed Scholarship
Breenna Berkland, Iota Sigma
Iowa State University

Lorraine Chantray-Howell Scholarship
Elizabeth Anzevino, Sigma Beta
Saint Joseph’s University

Maureen C. Tokar Scholarship
Keta Stephens, Kappa Kappa
Ball State University

Michaela Walsh-Libby Scholarship
Taylor Keenan, Pi Delta
University of Maryland

Paula Jones Salter Memorial Scholarship
Eileen Robinson, Nu Omicron
Vanderbilt University

Ruth M. Johnson Memorial Scholarship
Melyn Grissom, Nu Omicron
Vanderbilt University

San Diego Alumnae Chapter Honor Scholarship
Jennica Andrew, Theta Iota
California State University San Marcos

RETURNING ALUMNA RECIPENT

Jamie Bandy, Chi Lambda
University of Evansville

A SPECIAL RECOGNITION TO OUR TOP RECIPIENTS:

Undergraduate
Brooke Stokes, Omega Sigma
Oklahoma State University

Graduate
Rachel Bray, Delta Tau
University of Alabama Huntsville

Returning Alumna
Monique Goring, Delta
Tufts University

DIAMOND JUBILEE SCHOLARSHIPS

UNDERGRADUATE RECIPIENTS

Amelia Wilson, Epsilon Omega
Eastern Kentucky University

Farrah Mahan, Sigma Delta
Huntingdon College

Felicia Cenca, Epsilon Chi
Elon University

Isabella Brandes, Sigma
University of California Berkeley

Janna Tharp, Kappa Omega
University of Kentucky

Lauren Condon, Sigma Delta
Huntingdon College

Lauren Gravis, Gamma Chi
Carleton University

Magdalene Blewits, Zeta Pi
University of Alabama Birmingham

Taylor Kennedy, Delta
Tufts University

GRADUATE RECIPIENTS

Amanda Gilpin, Iota
University of Illinois

Courtney Smejdl, Phi Sigma
University of Nebraska Kearney

Lauren Chapman, Alpha Delta
University of Alabama

Mary Gasson, Sigma Delta
Huntington College

RETURNING ALUMNA RECIPENT

Jamie Bandy, Chi Lambda
University of Evansville
When I joined AOII they told me it would be for a lifetime and 10 years later I couldn’t say it better myself. When my family and I lost our home in the Louisiana flood, AOII helped us more than we could have ever imagined. We will always be grateful for the help, love and support AOII has given us during this hard time.

**Carley Bushnell Levy, Kappa Tau, ’06**
2016 Ruby Fund Recipient

I am truly honored to be chosen for this scholarship. After my first year as a collegiate member, I am not the same girl who went through recruitment a year ago; I am a better version of myself and it’s all because of AOII. I have learned that I am independent, brave and strong. After reading about Dina, I can see myself in her qualities….I have truly found the person I am meant to be because of this incredible sisterhood.

**Ali LeBourgeois, Kappa Tau, ’15**
2016-17 Dina D’Gerolamo, Undergraduate Scholarship Recipient

I am honored and humbled to receive the inaugural Julie A. Brining Memorial Scholarship. As a collegian, she held my respect based on her success and commitment to AOII. While her spirit will carry me through the duration of my MBA program, it’s that same feeling that will lead me down new paths upon completion.

**Katherine (Beth) Hardy, Gamma Delta, ’91**
2016-17 Julie A. Brining Memorial Returning Alumna Scholarship Recipient

I am truly honored and humbled to attend the inaugural UIFI. Without this scholarship, I would not have been able to attend. I had such an amazing week and growing experience…..and have been inspired to help our chapter and community live up to the values of our organization. I’m so fortunate to have this organization to push me to Exceed the Expectation. I’m looking forward to the opportunity to make our founders proud.

**Rachel Marquardt, Kappa Rho, ’13**
2016 UIFI Scholarship Recipient

By receiving this scholarship I was able to attend Leadership Institute and meet so many amazing sisters that I would have never known without this opportunity. Getting to learn more about AOII from fellow sisters was an unforgettable experience. After attending Leadership Institute, my love for AOII has definitely grown and I know now that I want to continue to be involved with AOII for the rest of my life.

**Allison Freeland, Delta Pi, ’14**
2016 Julie A. Brining- Emerging Leader Fellowship Recipient
Foundation Vision Statement
Securing the Future of Alpha Omicron Pi.

Story Snapshots

Foundation Mission Statement
The Alpha Omicron Pi Foundation is committed to enhancing the lives of our members and Securing the Future of our Fraternity through leadership development, scholarships and philanthropic endeavors.
As a collegiate member, joining AOII was an opportunity to be a part of a value-based organization of friends and a place I could call home. As an alumnae member, my devotion and love for AOII continues to grow because of the daily support of our fraternity through mentoring, advising, volunteering and donating. Being a part of the 1897 Society is an internal satisfaction of renewed commitment to the responsibility I pledged so long ago.

Susan Story, Omega Xi ’80
1897 Society Member & Foundation Ambassador

The 1897 Society is in honor of the founding of Alpha Omicron Pi in 1897 and serves as our leadership giving society. This society was launched in 2013 to recognize a very prestigious group of Foundation donors. Sisters and friends who make a leadership gift of $1,897 or more to our Loyalty Fund annually are recognized as members of this society.

Allison Allgier, Epsilon Omega
Phyllis Austin, Nu Lambda
Amy Bettencourt, Theta
Julie Bishop, Gamma Theta
Susan Bonifield, Nu Beta
Lacey Bowman, Chi Delta
Barbara Bruning, Theta Psi
Liz Coffey, Chi Lambda
Jo Davis Cole, Gamma Sigma
Crystal Combs, Nu Beta
Kath Conner, Nu Iota
Amber Countis, Pi
Peg Crawford, Iota
Susan Danko, Phi Upsilon
Tamee Dark, Lambda Tau
Andrea Dill, Chi Psi
Kathleen Donohue, Epsilon Chi
Kay Elam, Sigma Delta
Kelly Farel-Oliveros, Chi Lamba
Rene Fitzgerald, Pi Kappa
Gayle Fitzpatrick, Alpha Rho
Judy Flessner, Iota
Colleen Frojen, Tau
Ann Gilchrist, Theta
Phyllis Gilson, Sigma Phi
Lori Goede, Gamma Omicron
Rachel Grace, Nu Beta
Linda Grandolfo, Nu Iota
Martha Hazard, Chi
Lineea Herbert, Nu Iota
Lady Hood, Delta Delta
Grace Houston, Lambda Tau
Barbara Hunt, Phi Delta
Kathy Jensen, Theta Omega
Sally Cash Johnson, Delta Epsilon
Carole Jones, Alpha Delta
Hope Kniin, Lambda Tau
Caroline Lazzara, Lambda Beta
Troy LeForge, Beta Phi
Michelle Lopez, Delta Theta
Karen Marchese, Phi Lambda
Pam Mearsheimer, Phi Chi
Chris Miller, Iota
Erica Mohai, Beta Gamma
Karen Morasuki, Phi Delta
Dana Moreland, Delta Alpha
Lisa Niedenthal, Beta Phi
Aisoni Ortiz, Pi Theta
Terry Palmer, Phi Alpha
Kim Perez, Gamma Omicron
Tammmy Perkins, Lambda Sigma
Karen Phillips, Phi Chi
Becky Ratterman, Rho Omicron
Kristie Ryan, Rho Omicron
Lois Short, * Lambda Sigma
Susan Story, Omega Xi
Jane Tessmer, Gamma Theta
Maureen Tokar, Theta Eta
Dionn Tron, Omega
Cindy Visot, Kappa Tau
Dian Volkmer, Tau Delta
Sally Wagaman, Sigma Tau
Jessie Wang-Grimm, Phi Chi
Krista Whipple, Omega
Mary Williams, Phi
Leslie Wininger, Kappa Omega
Anne Wilmes, Chi Lamba
Judy Zawacke, Beta Lambda
Barb Zipperian, Kappa Kappa
Barbara Zolnierczak, Beta Pi

Companies:
CSL Management LLC
Lee, Danner & Bass
Sandmeyer Steel

* deceased
The Second Century Society (SCS) was founded in 1992 to recognize the importance of planned or deferred giving to the Foundation. SCS members believe strongly in the mission, vision and values of the Fraternity and want to ensure its long-term stability.

Alumnae who remember the AOII Foundation with a planned gift, and notify the Foundation of this intention become members of the Second Century Society.

I am very proud to be a member of the Second Century Society. For the past fifteen years, my husband and I have focused 100% of our charitable donations towards higher education. By including the AOII Foundation in our estate plans, I hope that I can help my AOII sisters achieve their academic goals well into the future.

Sharron Land Gegenheimer
Chi Delta, ’80
Second Century Society Member

NEW 2015-2016 SECOND CENTURY SOCIETY MEMBERS:
Carly Bella, Omega Upsilon
Gladys Britton*, Lambda
Andrea Dill, Chi Psi
Ilinca Iacob, Kappa Lambda
Carole Jones, Alpha Delta
Michelle Lopez, Delta Theta
Dionn Tron, Omega

*deceased
If each of our funds, from Scholarships and the Ruby Fund, to Educational Grants for our Fraternity, is a chapter within a book, our Loyalty Fund is the binding. Our Loyalty Fund is the fund that allows our Foundation to do all of the great work that we do. When you give to the Loyalty Fund, you enable us to support all of the chapters within our book. And, each gift begins a new chapter.

Unrestricted gifts to our Loyalty Fund allow the Foundation Board of Directors the ability to direct funds where they're needed most. Emerging needs can immediately be addressed, leveraging significant opportunities for advancement and daily support of our sisters.

Choose the Option Best for You!

MONTHLY DONATIONS
Monthly donations can be made as a recurring monthly contribution through bank draft or credit card.

PLANNED GIFTS / BEQUESTS
A planned gift can meet your short and long-term charitable and financial goals. Planned gifts include, but are not limited to: cash, bonds, stock, securities, personal property, retirement plan assets and insurance policies. Visit our website at aoiifoundation.org for more information on the Second Century Society.

ENDOWMENTS
Endowments, for a scholarship or other restricted purpose, can be established outright or through planned gifts.

MEMORIAL & HONOR GIFTS
Honor an AOII sister, friend or loved one with a memorial or tribute gift in her name. You can also recognize a special sister by sending a Foundation e-card at aoiifoundation.org.

CORPORATE MATCHING GIFTS
Several companies match an employee’s personal donation to nonprofit, tax-exempt foundations. Ask your employer if they participate in a gift-matching program.

HOW TO MAKE MY GIFT:

ONLINE
Visit the Foundation website at aoiifoundation.org and click on the “Donate Now” option. Alpha Omicron Pi Foundation accepts VISA, MasterCard, American Express and Discover.

CASH OR CHECK
Please mail donations to: Alpha Omicron Pi Foundation 5390 Virginia Way Brentwood, TN 37027

PHONE
We would love to speak with you! Give us a call at 615-370-0920 to make your gift by phone.
information updates

To update your name or other information, please contact us at foundation@alphaomicronpi.org.

financial information

Gifts to the Foundation are tax deductible on a U.S. return as allowed by law.

The AOII Foundation is a 501 (c) (3) nonprofit organization.

The fiscal year reported is July 1, 2015-June 30, 2016.

The annual audit is performed by Mullins, Clemmons & Mayes, PLLC.

The Foundation’s federal tax id number is 58-1343315.

The Alpha Omicron Pi Foundation’s IRS-990 may be viewed at www.guidestar.org.

Investment assets are managed by Lee, Danner & Bass, Inc.

privacy statement

Charitable organizations are occasionally asked to sell or lease the names and addresses of donors to other parties. As determined by the Foundation Board of Directors, the policy of the Alpha Omicron Pi Foundation strictly prohibits such action. AOII Foundation donor records are not sold, bartered, leased, exchanged or otherwise provided by the Foundation to outside organizations.