ALPHA OMICRON PI FOUNDATION’S 2017-2018 INVESTMENT REPORT

ALPHA OMICRON PI FOUNDATION AND YOU, Yes, You!
Dear sisters and friends,

You, yes, YOU are the reason that our Foundation exceeded $1 million in grants during our 40th Anniversary, and for the very first time in our history! As sisters of Alpha Omicron Pi, we seek to Inspire Ambition through your gifts back to our sisterhood which directly impact sisters today, tomorrow and forever. Together, we inspire positive change and growth within our Fraternity and are united by our common vision to provide opportunities and experiences that build confidence and inspire our members to take action and lead.

It is an exciting time at the Alpha Omicron Pi Foundation! We have an energized staff led by our Executive Director, Kristie Prichard Ryan; and our Board of Directors, Foundation Committees, Ambassadors and volunteers have all been working hard to serve our donors, sisters and friends of the Foundation. We recently updated our mission statement to reflect who we are as a Foundation. It now reads, “The AOII Foundation invests in our sisters and inspires a lifetime of giving to innovative leadership, educational and philanthropic causes.” Your gifts towards these vital initiatives ensure that Alpha Omicron Pi can support our sisterhood both now and for years to come.

Additionally, we have begun to implement a new strategic plan for the Foundation that will direct our staff and Board over the next five years. One of our primary goals will be to align the interests of our donors to the needs of our sisterhood. Support of educational and leadership programs is vital as we continue to welcome bright and innovative AOII sisters that will not only shape the future of our Fraternity but will shape the future of their communities and the world around them.

As I approach the end of my term as the Foundation Board President, I want to sincerely thank each of you for the support you have given to our Foundation. As you will see in the following pages, last year we were able to increase the funding for educational & leadership grants, scholarships and arthritis. Your donations are 100% responsible for this growth. You, yes, YOU are the reason we can share our story with future generations of AOII’s, celebrating a shared commitment to the principles established by four women who pledged themselves to one another more than 121 years ago. As we embrace a new year filled with opportunity and growth, your heart-felt gifts of all amounts are changing lives and shaping our future.

Roses,

Judy Gambrel Flessner
AOII Foundation President
Iota, University of Illinois
FOUNDATION

mission statement

The AOII Foundation invests in our sisters and inspires a lifetime of giving to innovative leadership, educational and philanthropic causes.

FOUNDATION BOARD OF DIRECTORS

JUDY GAMBERLE FLESSNER, Iota, President
ANDREA DILL, Chi Psi, Treasurer
MICHELLE SERRANO LOPEZ, Delta Theta, Secretary
KANDY CASSANO BERNSKOETTER, Sigma, Director
BARBARA HISS BRUNING, Theta Psi, Director
MEAGAN DAVIES, Alpha Chi, Director
RISSA REDDAN, Omega, Director
GAYLE FITZPATRICK, Alpha Rho, International President

FOUNDATION STAFF

KRISTIE PRICHARD RYAN, CFRE, Rho Omicron, Executive Director
JANA ADKINS, Rho Omicron, Director of Donor Relations
LUCY ANN GOSSETT, Pi Omicron, Administrative Services Manager
COURTNEY STAFFORD, Chi Omega Fraternity, Director of Advancement
LAURA WARD, Nu Omicron, Controller
### 2017-2018 Financial Report

#### Expenses

$1,932,600

- **Total Expenses**
- 35% $684,844 Arthritis Grants
- 10% $200,262 Educational and Leadership Grants
- 12% $232,168 Scholarship Program
- 5% $84,198 General Program Expenses
- 1% $12,806 Ruby Fund Program Grants
- 20% $395,237 Fundraising Expenses
- 1% $12,806 Ruby Fund Gifts
- 17% $323,085 General & Operating Expenses

#### Revenue

$1,836,654

- **Total Revenue**
- 41% $747,207 Arthritis Fund Gifts
- 27% $498,733 Loyalty Fund/Unrestricted Gifts
- 17% $308,506 Investment Income*
- 8% $155,647 Scholarship/Fraternity Grant Funds Gifts
- 4% $74,223 Other
- 3% $52,338 Ruby Fund Gifts

#### Balance Sheet

- **Cash and Cash Equivalents**: $532,743
- **Marketable Securities**: $7,287,030
- **Receivables**: $105,424
- **Fixed Assets**: $8,520
- **Total Assets**: $7,933,717
- **Liabilities**: $985,179
- **Total Net Assets**: $6,948,538
- **Total Net Assets & Liabilities**: $7,933,717

*Includes realized & unrealized investment gains & losses

Financial data for the Alpha Omicron Pi Foundation as of and for the fiscal year ending June 30, 2018.
GRANTS & SCHOLARSHIPS

TOTAL GRANTS AWARDED THANKS TO DONOR SUPPORT IN 2017-2018:

$1,037,522
LARGEST AMOUNT TO DATE!

Arthritis (66%)  Scholarships (23%)  Ruby Fund (1%)
Educational & Leadership Programming (10%)

EDUCATIONAL & LEADERSHIP PROGRAMMING: $105,450

- Fraternity programs funded for 2018-2019:
  - Educational Leadership Consultants (ELC) Program & Training
  - International Convention Programming
  - Leadership Academy Scholarships
  - Fulfilling the Promise: Online Training Program
  - Training Ambassadors Program
  - Leadership Scholarships
  - Arthritis Foundation Partnership and Events

RUBY FUND: 8 recipients = $12,304 awarded

ARTHRIXIS: $683,218
Arthritis programs and research initiatives funded for 2018-2019 thanks to donor support and AOII chapter events.

- Arthritis Foundation, Juvenile Arthritis Camps: $175,000
- Arthritis Foundation, Juvenile Arthritis Conference: $175,000
- Arthritis Foundation, Juvenile Arthritis Powerpacks: $50,000
- Arthritis Foundation, Welcome to Campus program: $91,000
- AOII Chapter Arthritis Mini-Grants: $83,218
- LiveYES! app: $100,000
- Vanderbilt University Research Grant: $9,000

SCHOLARSHIPS:

132 Scholarships Awarded = $231,000
4 Leadership Scholarships Awarded = $5,550

NEW SCHOLARSHIPS LAUNCHED

5 New Named Scholarships
+ 1 New Leadership Scholarship

1 IN 4 APPLICANTS AWARDED A SCHOLARSHIP

LAUNCH A NAMED SCHOLARSHIP

STEP 1
Complete a Named Scholarship Questionnaire, determining the scholarship criteria and eligibility.

STEP 2
The AOII Foundation Scholarship Committee selects a recipient based upon the criteria you have specified.

STEP 3
Finalize your commitment by signing a Scholarship Gift Agreement that has been customized to fulfill the intent of your scholarship.

STEP 4
Decide on how your scholarship will be funded:
Option 1: A cash gift of $5,000 or more may be made to initiate the fund. (Initial contribution for scholarships must be at least $5,000 with the intent to achieve a minimum endowed balance of $25,000 in cash gifts within five years of the date of the agreement).
Option 2: Launch the scholarship with a cash gift of $25,000.
CONGRATULATIONS TO OUR 2018-2019 SCHOLARSHIP RECIPIENTS!

NAMED SCHOLARSHIPS

Undergraduate Recipients

ALPHA TAU CHAPTER SCHOLARSHIP
Logan Haussman, Beta Phi

AMY ZIEGLER BETTENCOURT (THETA) SCHOLARSHIP
Jenna Stephany, Gamma Omicron

ANGELS OF KAPPA THETA MEMORIAL SCHOLARSHIP
McKenna Gallagher, Theta Iota

BARBARA HISS BRUNING SCHOLARSHIP
Randie Caine, Sigma Delta

BARBARA KOHLER - TAU CHAPTER SCHOLARSHIP
Madison Sutton, Tau

BETA PHI CENTENNIAL SCHOLARSHIP
Morgan Reid, Beta Phi

BETTY DUKE SCHOLARSHIP
Nikki Stone, Delta Nu

BEVERLY LANDES TOWNSEND - ALPHA PHI SCHOLARSHIP
Julian Kaptanian, Alpha Phi

BIRDIE HANSON NURSING SCHOLARSHIP
Adira Cohen, Omicron Pi

CANDY CARUSILE DERVAUX MEMORIAL SCHOLARSHIP
Melanie Glisson, Nu Beta

CAREY GRINER MEMORIAL - KAPPA KAPPA
CHAPTER SCHOLARSHIP
Kelsi Brown, Kappa Kappa

CARL E. SEARS MEMORIAL SCHOLARSHIP
Emma Cousins, Nu Beta

CAROLE JURENKO JONES - ALPHA DELTA
CHAPTER SCHOLARSHIP
Christianna Mason, Alpha Delta

CAROLINE CRAIG LAZZARA SCHOLARSHIP
Rachel Thompson, Phi Gamma

CHARLENE M. FAVRE SCHOLARSHIP
Alison Garcia, Kappa Chi

CLARANNE MARCHESE MEMORIAL SCHOLARSHIP
Gabriella Hosack, Phi Lambda

DAWN TRON ELLIOT SCHOLARSHIP
Lindsay Kaser, Omega

CENTENNIAL SCHOLARSHIP
Alexandra Brown, Pi Delta

DELTA RHO SCHOLARSHIP
Alice Khchoyan, Delta Rho

DINA D’GEROLAMO - KAPPA TAU SCHOLARSHIP
Jessica Litoiff, Kappa Tau

DOLORES RHODES SCHOLARSHIP
Julia Hamilton, Alpha Delta

DOTTIE LEEK - NU OMICRON SCHOLARSHIP
Tessa Jensen, Nu Omicron

GAYLE FITZPATRICK SCHOLARSHIP
Emma Tarnborg, Alpha Rho

GINGER BANKS SCHOLARSHIP
Anna Campbell, Alpha Delta

IOTA CHAPTER SCHOLARSHIP
Audrey Ashburn, Iota

IOTA SIGMA ENDOWED SCHOLARSHIP
Kaitlyn Sorley, Iota Sigma

JASMINE QUEEN - SIGMA TAU CHAPTER SCHOLARSHIP
Olivia Snyder, Phi Alpha

JENNIFER COMBS - CHI LAMBDA CHAPTER SCHOLARSHIP
Vaishnavi Ravigpati, Chi Lambda

JOLEEN HEIBERT FIELDS - DELTA OMEGA SCHOLARSHIP
Saydee Barr, Lambda Sigma

LEGACY OF LOYALTY TO LAMBDA TAU SCHOLARSHIP
Madison Gish, Delta Tau

LOU MEGINNESS COUCH - SIGMA OMICRON CHAPTER SCHOLARSHIP
Jenifer Fuller, Sigma Omicron

KAPPA GAMMA CHAPTER SCHOLARSHIP
Emma Morton, Kappa Gamma

KAREN FRIED KELONE “HEALING HAND” SCHOLARSHIP
Lauren Margiotti, Alpha Mu

KERRI KEITH MEMORIAL - GAMMA SIGMA CHAPTER SCHOLARSHIP
Emily Pierce, Gamma Sigma

LANGSTON/PURDY - LAMBDA SIGMA/ALPHA DELTA CHAPTERS SCHOLARSHIP
Ashley Bough, Lambda Sigma

MADISON ELZEU
Lambda Chi (LaGrange College) ’16
2018 Julie A. Brining Emerging Leader Fellowship Award

At the Leadership Institute was an extraordinary experience that impacted me as a woman, a leader in my chapter, and a leader in other campus organizations. Leadership Institute was an amazing experience that has fired me up going into this upcoming school year. It was so nice to spend a weekend with my international sisters and learn alongside them. I made so many great friendships and connections with other ladies that I know will be beneficial in my collegiate experience and beyond college.

MICHAELA WALSH-LIBBY SCHOLARSHIP
Abby Perasso, Pi Delta

MUREIL T. MCKINNEY SCHOLARSHIP
Ashley McFarquhar, Kappa Phi

NU IOTA CHAPTER SCHOLARSHIP
Emma Lentsch, Zeta

PAT HAYES CUTLIP & DOTTI HAYES CUTLIP SCHOLARSHIP
Saven Morris, Beta Zeta

RACHEL ALLEN - ALPHA CHI CHAPTER SCHOLARSHIP
Hannah White, Alpha Chi

RHO OMICRON CHAPTER SCHOLARSHIP
Sarah Fagiana, Rho Omicron

ROBERT & ELEANORE MACCURDY SCHOLARSHIP
Tara Principe, Gamma Delta

RUTH E. THOMPSON MEMORIAL SCHOLARSHIP
Eleanor Kaverman, Beta Phi

SABRINA KEENE SCHOLARSHIP
Morgan Kiser, Omega Sigma

SUSAN DANKO SCHOLARSHIP
Mary Kate Cartwright, Phi Upsilon

TERRY MIZE PALMER - LAMBDA OMICRON SCHOLARSHIP
Virginia Lea, Lambda Omicron
The object of our fraternity explicitly states to, “stand at all times for character, dignity, scholarship, and college loyalty,” and the AOII Foundation’s dedication to awarding students who achieve, not only as students, but as active members of their college community, is a testament to its dedication to the values and causes at the center of our sisterhood. I am beyond honored to have been a recipient of the Diamond Jubilee scholarship and hope that I can utilize its funds to continue not only my education, but my growing passion for serving a community that is often rendered voiceless as I earn my Masters in Speech-Language Pathology.

ALLISON GLASCOCK
Alpha Chi (Western Kentucky University) ’15
Graduate, Diamond Jubilee Scholarship Recipient
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 above to our Loyalty Fund annually are recognized as members of this society.

My wonderful journey with Alpha Omicron Pi began during my collegiate years at Texas Woman’s University, and I have sought to find ways to give back to our Fraternity ever since. It was actually one of my Delta Theta sisters who spoke with me about the 1897 Society and the contributions I could make to support a variety of Fraternity programs. It brings me great joy to support the work of the Fraternity and do so in a way that works best for me. Because the AOIi Foundation offers a monthly giving option, I am able to give my contribution over a period of time. I believe in the sorority experience and know there are so many positive life skills that can be learned when our members have access to high-quality programs and supportive environments. My monthly gift goes directly to the Loyalty Fund, which supports areas with greatest need, like Leadership and Educational Grants. It feels good to know my gift is making an impact on current and future generations of AOIis.

NICOLE CRONENWETT
Delta Theta (Texas Woman’s University) ’92
1897 Society Member and Monthly Donor

THE 1897 SOCIETY

Allison Allgier, Epsilon Omega
Phyllis Austin, Nu Lambda
Kandy Bernskoetter, Sigma
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
Linda Collier, Chi Omicron
Crystal Combs, Nu Beta
Kath Conver, Nu Iota
Amber Counts, Pi
Peg Crawford, Iota
Nicole Cronenwett, Delta Theta
Thelma Culverson, Kappa Theta
Susan Danko, Phi Upsilon
Tamee Dark, Lambda Tau
Meagan Davies, Alpha Chi
Andrea Dill, Chi Psi
Kathleen Donohue, Epsilon Chi
Kelly Farrell-OLiverson, Chi Lambda
Rene Fitzgerald, Pi Kappa
Gayle Fitzpatrick, Alpha Rho
Judy Flessner, Iota
Phyllis Gilson, Sigma Phi
Lori Goede, Gamma Omicron
Rachel Grace, Nu Beta
Linda B. Grandolfo, Nu Iota
Melanie Graper, Nu Lambda
Jennifer Greulich, Alpha Chi
Suan Guess-Hanson, Beta Lambda
Beverly Hatcher, Theta Psi
Nancy Hohmann, Phi
Grace Houston, Lambda Tau
Martha Houston, Pi Kappa
Patricia Howard-Peebles, Phi
Barbara Hunt, Phi Delta
Karen Ihrig, Nu Iota
Kathy Jensen, Theta Omega
Sally Cash Johnson, Delta Epsilon
Carole Jones, Alpha Delta
Frances Kende, Omega
Jacqueline Koustrup, Beta Lambda
Caroline Lazzara, Lambda Beta
Troy LeForge, Beta Phi
Michelle Lopez, Delta Theta
Karen Marchese, Pi Lambda
Barbara Maxwell, Iota Alpha
Pam Mearsheimer, Phi Chi
Erica Mohai, Beta Gamma
Dana Moreland, Delta Alpha
Lisa Niedenthal, Beta Phi
Terry Palmer, Phi Alpha
Koren Phillips, Phi Chi
Francey Porter, Omega
Becky Ratterman, Rho Omicron
Rissa Reddan, Omega

COMPANIES
Broer-Freeman
CSL Management, LLC
Jurenko Foundation
Lee, Danner & Bass, Inc.
Sandmeyer Steel
The Loyalty Fund supports all of the other funds of the AOII Foundation. Gifts to the Loyalty Fund allow the Foundation Board of Directors the ability to direct funding where it’s needed most. Therefore, we are able to continue awarding RUBY FUND GRANTS, SCHOLARSHIPS, EDUCATIONAL & LEADERSHIP PROGRAMMING to the Fraternity and ARTHRITIS GRANTS.

Without donations to the Loyalty Fund, we can’t continue administering these vital programs that support our sisters at every age.

Raising Roses was a great way for me to give back to something so close to my heart. It inspired me to start giving as a collegiate member and will encourage me to keep giving throughout my life! It is great to be able to know that the money we give goes to support our sisters!

MADISON ROXBURY
Sigma Rho (Slippery Rock University) ’16
Raising Roses Collegiate Donor
GIVING OPPORTUNITIES TO MATCH YOUR NEEDS

1897 SOCIETY
The 1897 Society is in honor of the founding of Alpha Omicron Pi in 1897 and serves as our leadership giving society. Sisters and friends who make an annual contribution of $1,897 or above to our Loyalty Fund are recognized as members of this society.

WAYS TO MAKE YOUR GIFT:

ONLINE
Visit the Foundation website at aoiifoundation.org and click on the “Donate” button. 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.

MONTHLY DONATIONS
Monthly donations can be made as a one-time gift or recurring monthly contribution, through bank draft or credit card.

MEMORIAL & HONOR GIFTS
Honor an AOII sister, friend or loved one with a memorial or tribute gift in her name.

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.

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.

SECOND CENTURY SOCIETY
The Second Century Society is reserved for alumnae who remember the AOII Foundation with a planned gift. 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.

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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, 2017-June 30, 2018.
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 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.

Chapter photos courtesy of the Epsilon Gamma chapter.

INFORMATION UPDATES
To update your name or other information, please contact us at foundation@alphaomicronpi.org.
Additionally, if you know of a sister listed in this report that has passed away, please contact us.