

Theta Phi Alpha

FOUNDATION

2020 ANNUAL REPORT



Theta Phi Alpha
New mental health initiative!
KICKOFF
Sept. 1
7 p.m. ET



Diversity, Equity,
Inclusion &
Access Fund



Left: Chairman Stefanie Hreha Hunter. Above, Ross Szabo.

Our Vision

*Ever Loyal Commitment
Ever Lasting Support*

Hindsight 2020: Reflection in Enduring our Challenges

Dear Sisters and Friends,

Hindsight is 20/20 – and as a year, 2020 itself brought with it many new challenges and perhaps a newfound appreciation for the word “endure.” As sisters of Theta Phi Alpha, within our communities, our sisterhood, and in our daily lives, we have all endured so much, like the motto given to us from Theta Phi Alpha’s Patroness, St. Catherine of Siena. Despite that we are all enduring a pandemic, we’ve also been able to achieve many great things – we’ve learned how to be better together, no matter the distance. Through our creation of virtual events and fundraising efforts, you have reminded us that we are capable of doing so much more than enduring – we are able to make a difference, no matter what obstacles might be in our way.

As I reflect upon this year that has been 2020, I find myself proud of the accomplishments made possible by our volunteers and donors, such as the formal launch of mental health programming for Theta Phi

Alpha’s collegians with the Behind Happy Faces program. I’m also proud of the Foundation’s support of the Fraternity’s new focus on Diversity, Equity, Inclusion and Access (DEIA) initiatives through the creation of a DEIA Fund. As we continue to grow and move into 2021, we know that these new programs are critical areas of needed support and raising awareness. These new items join our need to focus upon the growing need for scholarship opportunities, disaster relief support, and the continued development and growth of not only our board and volunteer structure, but also of our donors and the recognition for all that you do to help us to meet our mission.

In the spirit of recognition, we thank Leslie Ervin Trahant, AB, for her years of service with the Foundation as Chairman and previously as the Director of Strategic Giving. Leslie’s ten years of service and leadership were immensely valuable and productive. We wish her the best as she continues to support our endeavors as a volunteer.

Join me in welcoming two new Directors to the Foundation: Lucy Holmes-Higgin, AE, and the return of Director and previous Chairman, Lara Pearson. ΑΩ.

Looking forward to 2021, we strive to thrive. To continue to support our sisters, to encourage each other and to find ways to be there for one another at a time where it may not be physically possible to do so. We may hear words and phrases such as “the new norm,” but we’ve already endured and learned how to overcome these challenges. We know that as we’ve moved through the many stages of our membership that we are always better together - that the support of Theta Phi Alpha is never a new norm – but an Ever Loyal and Ever Lasting journey. We appreciate your Commitment and Support on the road ahead.

Yours in the bonds of sisterhood,

Stefanie Hreha Hunter, ΓΚ
Chairman
Theta Phi Alpha Foundation

2020 Academic Scholarships

Since 1959, over \$370,000 in academic scholarships have been granted.

\$1,000

Elissa Calpin, ΑΠ
Dorothy Caughey Phalan Scholarship

Linda Cartagena, ΒΝ
Katrina Caughey Ward Scholarship

Aysha Chaudhary, Ζ
Otilia Leuchtweis O'Hara Scholarship

Madison Copot, ΔΝ
The Alpha Gamma Scholarship

Samantha Eron, ΔΔ
The Sigma of Akron Scholarship

Esilona Kristani, ΒΞ
Mildred Connely Scholarship

Emily Miske, ΔΑ
The Alpha Nu Memorial Scholarship

Julia Osadchy, ΓΔ
Camilla Ryan Sutherland Scholarship

Arielle Rementilla, ΑΕ
Selma Gilday Scholarship

Olivia Rivera, ΒΕ
Helen Ryan Quinlan Scholarship

\$1,500

Ayli Carrero Pinedo, ΑΠ
Centennial & Guard of Honor Scholarship

Abigail Seipel, ΓΝ
Eva Stroh Bauer Everson Scholarship

\$2,000

Emilia DiFabrizio, ΑΒ
Jean M. Cusack Memorial Scholarship

Bianca Huerta, ΔΝ
Amelia McSweeney Scholarship

Sophia Farriella, ΓΨ
May C. Ryan Scholarship

Scholarship Spotlight - Cartagena

Sister, student, daughter, mother, mentor, wife, and future educator are words that aptly describe Linda Cartagena, ΒΝ, the 2020 recipient of the Katrina Caughey Ward Academic Scholarship. Linda is a music and education major at Florida Atlantic University.

Linda is very family-oriented, taking great inspiration and motivation from her parents, saying "my father was a Marine who served for over 20 years. He constantly raised me and embedded the idea that loyalty and truth are pertinent values to stand by. Through constant persistence of being loyal and truthful, you will in turn find people who will help you grow and stay by your side through thick and thin. Every day, I try my best to live to honor the teaching of my parents and uphold the morals and characteristics that I want to instill in my sisters, family, and students." She and her father have shared the experience by attending college concurrently. Her mother was raised in a remote part of Mexico and has shared many cultural teachings from her indigenous ancestors.

The support of her parents helped her to pursue her love of music and her related goals. Because they saw how hard she worked to raise funds for orchestra trips and concert attire, they frequently gave her gifts of instruments or other musical equipment to help Linda pursue her aspirations. As a senior in high school, she even chose receiving a new cello over a car – that's dedication! Her parents' belief in Linda and her goals helped to shape her into the woman she is today. Linda's career plans include teaching



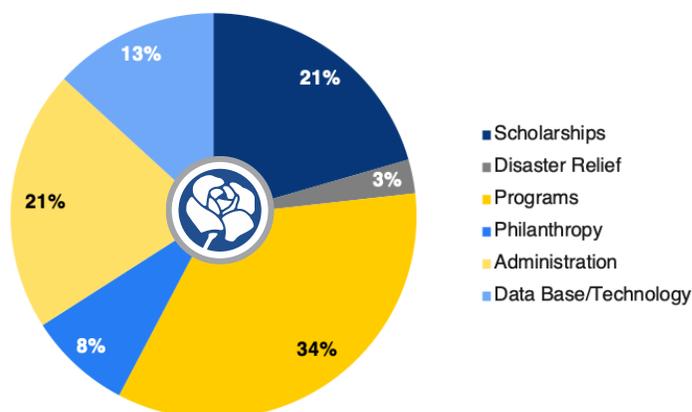
Linda Cartagena, ΒΝ

music, which she believes makes her students not only musicians, but also better people and better students. She believes that they will learn not only fundamentals of music, but also life skills like time management, goal setting, resourcefulness, and planning by participating as an extracurricular activity. Long-term, Linda wants to provide non-profit music lessons to lower income students to provide them the opportunity to learn these skills and life lessons.

As Linda's family has grown, so has her family support. Linda and her husband James are raising their five-year old son, Sebastian. James was able to relocate his business when Linda had the opportunity to attend FAU, so the family moved. James' support has been integral not only to Linda's pursuit of her undergraduate degree, but he also encouraged her to join Theta Phi Alpha. Linda is looking forward to graduating in May 2021.

Fiscal Year 2020 Financial Results

2019-2020 Expenses



Revenue (US\$)

Restricted	\$55,467
Unrestricted	<u>55,867</u>
Total Revenue	111,334

Expenses

Disaster Relief	\$2,500
Philanthropy	7,621
Programs	31,927
Scholarships	19,000
Administration	19,335
Investment in Technology	<u>12,209</u>
Total Expenses	92,592

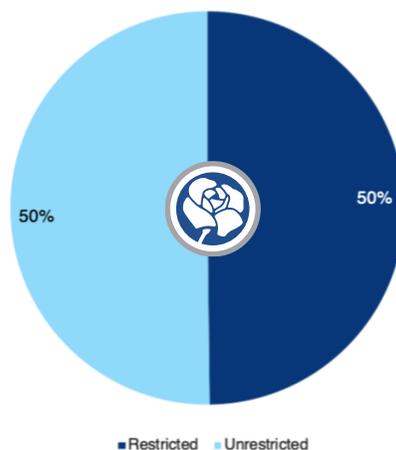
Net Income **\$18,851**

During the 2020 fiscal year, our income increased over the prior year. Due to generous contributions by our donors, programming expenses increased to support the Behind Happy Faces program. Philanthropy expenses include a passthrough contribution to the NAACP Legal Defense Fund made by Fraternity and Foundation leaders. Scholarship increases are typical of a "Convention" year. Disaster relief grants increased

to support sisters whose needs were created by the COVID-19 emergency declaration.

Administration includes mailings, office staff, articles in *The Compass*, supplies, insurance, and accounting.

2019-2020 Income



Our financial picture improved with total assets increasing to \$372,518. 81.3% of these funds are restricted for use in accordance with donors' wishes.

Donor Profile

The first of 14 Pennsylvania-based Theta Phi Alpha chapters was installed as the Kappa chapter at the University of Pittsburgh; Theta Phi Alpha's second-longest continuous tenure.

The Pittsburgh Alumnae Association is one of the longest-serving alumnae groups with members from across the country.

The Pittsburgh Alumnae Association created an endowment agreement to fund scholarships. In **BREAKING NEWS**, this fund has become fully-endowed as of November 2020 with the first scholarships from this fund to be granted during Kappa chapter's Centennial celebration year in 2020!

Among the many generous supporters in Pittsburgh are the Caliendo sisters: Irene Caliendo, Marcia Caliendo, and Joyce Caliendo Reinoso. They are just three of nine children in their family, known for not only their loyalty and dedication, but a great sense of humor and outstanding ability as storytellers!



Association member Amy Bailes, AY, says, "The Caliendo sisters are three of my favorite people on this earth. They are strong women who are role models for all women, not only Theta Phis. They are outspoken (in a good way!), funny, funny women. and are very loving and giving. I guess that comes from their large close-knit family. I love being in their company."

Amy continues, "Irene is the epitome of loyalty to Theta Phi Alpha. Not only is she a new member of the Sapphire Circle, but she has served the Fraternity on all levels throughout those 50 years. She has attended the most Conventions of any alumna. I told her I want to be just like her when I grow up."

Giving Programs

Sisterhood Society

The Sisterhood Society program is for collegians who support the Foundation with an annual gift of \$19.12 or more. A link to the brochure is shown at: <http://thetaphialpha.org/sisterhood-society>.

Sustaining Sister

Sustaining Sisters make recurring monthly, quarterly, or annual contributions from bank accounts or via credit/debit cards. Information on this no-fee program is shown at: <http://thetaphialpha.org/Foundation/Giving/Sustaining-Sister>.

1912 Society

The 1912 Society provides special recognition to sisters who give a legacy gift to Theta Phi Alpha Foundation, such as through wills, trusts, or beneficiary. See <http://thetaphialpha.org/1912-society> for information.

Matching Gifts

Maximize the impact of your contribution by completing a Matching Gift request through your employer, if available. Check with your company's Human Resources department for details.

Donor Information

Donor information is for the calendar year 2020; our financials are for the fiscal year ended September 30th. We make every effort to recognize everyone who has contributed to our success, but we have learned through experience, try as we might, we may miss someone. If we have missed your name, please notify us at: foundation@thetaphialpha.org so we may recognize you properly.

Contact Us!

Please contact Theta Phi Alpha Foundation, at 440-899-9282 or foundation@thetaphialpha.org.

Restricted Funds

Theta Phi Alpha Foundation also appreciates contributions designated to our specialized funds.

Endowments

Endowed funds have been generously established by contributions greater than \$20,000.

Scholarship

- Amelia McSweeney Scholarship Fund endowed in memory of Megan Beck, BΩ, and Stephanie Coonan, BB
- Jean M. Cusack Memorial Scholarship Fund
- Sigma of Akron Scholarship Fund
- Alpha Gamma Scholarship Fund
- Alpha Nu Memorial Scholarship Fund
- Pittsburgh Scholarship

Education

- Dr. Mari Ann Callais Leadership Endowment

Philanthropy

- Susan M. Check Memorial Endowment for Glenmary

Additional funds working towards a scholarship endowment are:

- Epsilon 100th Anniversary
- The Good Life Scholarship - sponsored by Mu and Alpha Pi chapters along with Lincoln and Northeastern Nebraska Alumnae Associations
- Greater Cleveland and Alpha Xi

Sponsorships

Academic scholarships presented during 2020 were sponsored or endowed. Our 2020 sponsor is:

- Collegians and alumnae of Alpha Epsilon Chapter and St. John's friends in memory of Charmaine Lalane, AE

Our Mission

Theta Phi Alpha Foundation enriches Theta Phi Alpha sisters by providing resources for scholarship, philanthropy, and education through charitable giving.



#GivingTuesday 2020 ambassadors: Linda Cartagena, Kaitlyn Byrnes, Bailey Wilson, Natalie Niyazov, Julia Osadschy, Sami Eron, Emily Dillon, and Elissa Calpin. Thank you, sisters!



Chairmen

Stefanie Hreha Hunter, ΓK
Leslie Ervin Trahant, AB

Directors

Katie Evans, AN
Lucy Holmes -Higgin, AE
Tracey Liphardt, AN
Becky Dixon McLaren, AM
Lara Pearson, AΩ
Kathleen Sullivan, AΓ
Valerie Vertin Thomas, AN