

Theta Phi Alpha

FOUNDATION

2022 ANNUAL REPORT



Our Vision

Ever Loyal Commitment

Ever Lasting Support

The Strength of our Foundation is our Sisterhood

Hello Sisters and Friends,

We welcomed sisters at the 2022 National Convention in Memphis, while staying in touch with sisters who remained at home with our #unCONVENTIONAL program. At Convention, we sponsored two professional speakers and the philanthropy of the Siena Medalist. A visit to the National Civil Rights Museum was offered to the Convention body. These activities help to strengthen our members with educational opportunities.

Our academic scholarship program continues to be strong. The year-long celebration of the 60th anniversary of granting the first scholarships from the Foundation wrapped up with a decade-by-decade historical review. At the 2022 National Convention, we crossed the \$400,000 mark in scholarships granted! The program now includes six endowed scholarships and seven scholarship funds working to create an

endowed fund. We are grateful for the support of our sisters that has built our strong Foundation,

For the Theta Phi Alpha Relief Grants program, I had the honor of meeting our recipient and her family, including a newborn legacy, when I delivered the Grant check in person to Jessica LeConte Sutter, Beta Zeta. We reflected upon our shared experience in weathering Hurricane Ian that had ravaged the Florida Gulf Coast during September 2022.

The Fraternity will be pursuing new programming resources for mental health with the support of a generous contribution. Collegians requested support in this key area to benefit the membership.

Endowment funds for leadership education and philanthropy support the other key components of our mission. We will be looking for additional opportunities to expand the educational offerings

and membership experience for our collegians and alumnae. Technology will take a key role in this important area. Stay tuned!

Thanks to our outgoing directors Tracey Liphardt, Alpha Nu; Lara Pearson, Alpha Omega; and Donna Lindsay, Beta Gamma. We also welcomed Rachel Feldberg Flansburg, Delta Alpha, to work with collegian and leadership consultant programming.

Our unity builds our Foundation's strength. Our ever lasting support of Theta Phi Alpha's education and programs and technology is critical to building the organization's future leaders. Thank you for joining me with your ever loyal commitment.

Yours in the bonds of sisterhood,

Becky Dixon McLaren

Chairman

Theta Phi Alpha Foundation

2022 Academic Scholarships

Since 1961*, over \$408,000 in academic scholarships have been granted.

\$4,000

Surina Birk, ΔN
Selma Gilday Scholarship

\$3,000

Kathleen Nolan, ΑΨ
Mildred Connely Scholarship

Matti Oshin, ΔN
Dorothy Caughey Phalan Scholarship

\$2,000

Carissa Link, ΓE
Jean M. Cusack Memorial Scholarship

Sophie Long, ΒΨ
Amelia McSweeney Scholarship

Sara Woods, ΒΔ
May C. Ryan Scholarship

\$1,000

Gabriella Agostano, ΓΓ
Otilia Leuchtweis O'Hara Scholarship

Beatrice Waterman, ΔΓ
Katrina Caughey Ward Scholarship

Stephanie Sacco, ΔΘ
Helen Ryan Quinlan Scholarship

Krissy Bogolawski, ΑE
Camilla Ryan Sutherland Scholarship

KhaLesha Williams, ΓΨ
Eva Stroh Bauer Everson Scholarship

*The Foundation was founded in 1959 and granted its first scholarships in 1961.



Scholarship Spotlight – the Link Sisters



Scholarship recipients Cassie Link (2021) and Carissa Link (2022) are double sisters, initiated at Gamma Epsilon chapter at Shawnee State University.

Occupational Therapy, but adding a bachelor's degree in Psychology, to help her understanding of mental health. Upon graduation, she hopes to work for a school system and coach team sports.

Together with their middle sister Callie, they were founding members of the inaugural swim team at Shawnee State. Carissa swims the 200M Butterfly and 400M Individual Medley.

We have found that Carissa's involvement at Convention and as president has renewed Cassie's connection to Theta Phi Alpha. Cassie received daily updates about the excitement, so she participated in the silent auction and purchased all four Sisterhood Society charms. She appreciated the opportunity to give back to the Foundation and her Theta Phi sisters, saying "The Foundation supports Theta Phi sisters. You never know when you or someone else close to you may benefit. Your donation adds up and the more the Foundation has the more it can give back in the future."

Before Carissa attended Convention, Theta Phi Alpha was just local to Cassie. Since then, Cassie has been inspired to volunteer for Theta Phi Alpha and joined the DEIA committee this month and looks forward to making an impact nationally.

The link these double sisters share inspires and leads each other to new levels.

The Foundation granted 11 academic scholarships for \$21,000 during 2022.

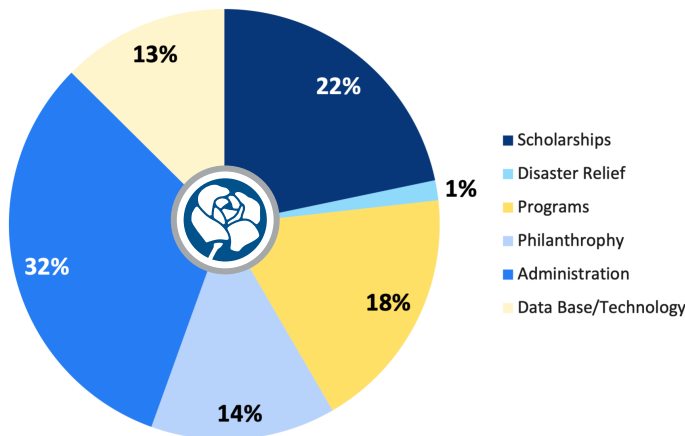
One recipient is not only a legacy member of Theta Phi Alpha, but her sister received a Foundation scholarship during 2021. Carissa Link is an initiate of Gamma Epsilon chapter at Shawnee State University in Portsmouth, Ohio. Carissa received her scholarship at the 2022 National Convention in Memphis. Carissa was elected Chapter President shortly after her initiation during the pandemic when meetings were held via Zoom. Her sister credited her with restoring the chapter to health.

Her eldest sister, Cassie (Cassandra), received a 2021 Foundation scholarship. Cassie is an alumna with a bachelors and masters from Shawnee in Occupational Therapy. Cassie now works in a hospital in Sandusky, Ohio, with children with developmental delay and adults with physical and mental health challenges.

Carissa followed in Cassie's footsteps in a number of ways, besides joining Theta Phi Alpha at Shawnee. For example, she too is pursuing studies in

Financial Results: Fiscal Year 2021 – 2022

2021-2022 Expenses



Revenue (US\$)

| | |
|--------------------------|----------------|
| Restricted | \$65,051 |
| Unrestricted | <u>43,294</u> |
| Operating Revenue | 108,345 |

Expenses

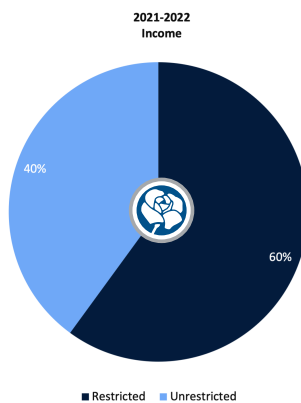
| | |
|-------------------------|-------------------------|
| Philanthropy | 13,428 |
| Programs | 17,795 |
| Relief Grants | 1,450 |
| Scholarships | 21,000 |
| Administration | 30,887 |
| Technology | <u>12,145</u> |
| Total Expenses | 96,704 |
| Operating Income | 11,641 |
| Investment Loss | 116,162 |
| Net Loss | <u>\$104,521</u> |

The generous contributions of sisters and friends of Theta Phi Alpha Foundation remained strong during the 2022 fiscal year. Overall increased expenses are primarily due returning to National Convention, with expenses such as professional speakers, contributions to the philanthropy of the Siena Medalist, the Foundation Breakfast and the resumption of Camp Friendship.

The Foundation continues to collaborate with Theta Phi Alpha

to provide technology to support the membership database and portals, which provides internal reporting capability, and offers increased accessibility to sisters.

Your generous contributions help us to provide academic and NGLA scholarships, support educational and development programs and leadership



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

Our financial picture followed the market with a net loss for the fiscal year. Our investments total \$392,565, with 87% of these funds restricted for use in accordance with donors' wishes.

Donor Profile Delta Delta Chapter



Ashland University in Ashland, Ohio is the home of Theta Phi Alpha's Delta Delta chapter. They were installed during 2014.

Annually, the chapter holds a Sapphire Ball to raise funds for Theta Phi Alpha's national philanthropy - Camp Friendship in Mississippi. Friends, family, and alumnae are welcomed. The chapter started small, but the event has more than doubled its annual income

Since their installation, Delta Delta has raised \$47,030 for the Foundation! The chapter was recognized at National Convention for achieving the highest lifetime giving level of all Theta Phi Alpha chapters, contributing \$25,100 during the biennium. These record numbers are greatly appreciated.

For their efforts, the chapter is receiving a custom-designed flag for the chapter. Additionally, a special Theta Phi Alpha history panel discussion was held with the chapter, featuring three esteemed Past National Presidents: Mary Lou Conrad Swartz, Sigma; Patricia Manelski Giallanza, Upsilon; and Dr. Mari Ann Callais, Alpha Beta. It was a wonderful evening of storytelling with women who led Theta Phi Alpha across four decades.

We admire the efforts and commitment of Delta Delta and look forward to what they achieve next!

Theta Phi Alpha Relief Grants - Sisters Helping Sisters

Sisters Helping Sisters is what the Theta Phi Alpha Relief Grant program accomplishes.

As the last fiscal year ended, two hurricanes, Henri and Ida, hit from Louisiana to New York, affecting many Theta Phi Alpha sisters in their path. We were able to help two sisters and their families. One collegian lost schoolbooks, her laptop, and backpack among her personal items, when the roof of the family home was damaged during Hurricane Ida. An alumna who had returned to college incurred additional, expensive travel costs when she was diverted because of Hurricane Ida. With the help of our sisters, these sisters have been able to continue their studies.

Extensive roof damage, no running water or electricity and extreme heat caused Jessica and her family to seek shelter elsewhere in the aftermath of Hurricane Ian. She was also nine months pregnant with her (legacy) daughter. She appreciated the support and relief.



Jessica Sutter LeConte, BZ and her newborn daughter received her Relief Grant check in person from Foundation Chair Becky McLaren after Hurricane Ian hit Ft. Myers, Florida.

Our Mission

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



Chairman

Becky Dixon McLaren, AM

Directors

- Antoinette Cummins, BΓ
- Rachel Flansburg, ΔA
- Lucy Holmes-Higgin, AE
- Kristin Henkenius, AΠ
- Kathleen Sullivan, AΓ
- Val Vertin Thomas, AN



Becky



Kathy



Kristin



Antoinette



Rachel



Lucy



Val