

2018 Annual Report

of the



Saturday, November 3, 2018

9:00am – 10:30am

University of North Carolina at Chapel Hill

UNC Student Union

Room 2420

Building A Better World - One Student At A Time



THETA OMICRON
FOUNDATION

Annual General Meeting

November 3, 2018

Agenda

Opening	All
Welcome	John Atwater - Polemarch, Theta Omicron Chapter
Occasion	Louis Newsome - President
Treasurer's Report	Kelvin Anthony - Treasurer
Secretary's Report	Terry Wallace - Secretary
Membership Report	Hugh Holston - Vice-President
President's Report	Louis Newsome – President
Q&A	All
Closing & Fellowship	All

John Atwater



Polemarch, Theta Omicron Chapter
University of North Carolina at Chapel Hill
Kappa Alpha Psi Fraternity, Inc



Our History

On **May 8, 1976**, the Theta Omicron Chapter of Kappa Alpha Psi Fraternity, Inc. was chartered at the University of North Carolina at Chapel Hill as an organization focused on achievement. The Theta Omicron Chapter became the 205th chapter in the Fraternity and more than 250 initiates have joined Kappa Alpha Psi through the Chapter.

On **September 9, 2016**, the Theta Omicron Foundation was incorporated in the state of North Carolina. The idea to form the Foundation was launched by the chapter members in attendance at the 40th Anniversary celebration of the Theta Omicron Chapter on April 8-10, 2016.

The Theta Omicron Foundation is recognized as a tax-exempt organization under section **501(c)(3)** of the Internal Revenue Code.



THETA OMICRON
FOUNDATION

Occasion

Our Mission

The **Theta Omicron Foundation** endeavors to foster the intellectual, ethical, social, and moral development of young people; deepen young people's commitment to their communities; promote pro-social values such as personal responsibility, respect for self, and respect for others; to inspire service in the public's interest; and promote achievement in every field of human endeavor.



Our Approach

We Will:

- Develop unique strategies to connect university recruitment activities with minority-focused student mentoring programs
- Forge alliances across university alumni, mentoring programs and university stakeholders
- Utilize data to identify areas of concern regarding admission and graduation of male students of color
- Utilize data to measure progress toward addressing areas of concern
- Engage in dialogue and participate in forums focused on validating the value of student diversity and efforts to ensure success with that goal
- Focus our efforts on advancing diversity at our alma mater, the University of North Carolina at Chapel Hill
- Engage with Kappa Alpha Psi Fraternity's Guide Right activities as a model for aspiring college student mentoring programs

Our Goals

- Increase the number **applications** from male students of color for admission to the University
- Increase the number of **admissions** from male students of color to the University
- Increase the **graduation** rates for male students of color



THETA OMICRON
FOUNDATION

Occasion

Our Leadership



**Louis
Newsome**

President



**Hugh
Holston**

Vice-President



**Terry
Wallace**

Secretary



**Kelvin
Anthony**

Treasurer



**DeSota
Wilson**

Director



**Derrick
Boone Sr.**

Director



**Kevin
Mason**

Director



Financials

- Current Account Balance
- Overview of Account Activity
 - Fall '93 Donation
 - 40th Anniversary Proceeds
 - Membership Dues
- Questions?

Overview of Bylaws

Membership Qualifications

- Member, alumnus, or affiliate of the Theta Omicron Chapter at UNC

Board of Directors

- Must be current or alumnus of the Theta Omicron Chapter at UNC (does not include affiliates)
- Four officers (President, VP, Secretary, and Treasurer) - 3-year terms
- Three non-officer directors - 3, 4, and 5-year terms, respectively
- Signed Standard of Conduct agreement
- Signed Financial Conflict of Interest agreement
- Fiscal Year (September 1 to August 31 of the following year)
- Board Meetings

Corporation Formation and Highlights

April 8-10, 2016	T.O. 40 th Anniversary Celebration
August 31, 2016	Annual Meeting <ul style="list-style-type: none">- Authorized filing of corporate documents- Bylaws adopted
September 2, 2016	Received Employer Identification Number (EIN)
September 9, 2016	Articles of Incorporation filed with NC Secretary of State
August 31, 2017	Annual Meeting <ul style="list-style-type: none">- Nominations committee appointed to elect officers
June 3, 2018	Current slate of officers and directors elected
June 28, 2018	- Received recognition from IRS as a 501(c)(3) entity (tax-exempt status)

TOF Committee Overview

- **Bylaws**
- **Budget**
- **Programs & Strategy**
- **Branding/Marketing/Communications**
- **Membership**
- **Development**
- **Investment**
- **IT/Website**

Affiliations - Theta Omicron Foundation

Donors

- Any natural person, corporation, or entity
- Any gift amount accepted

Members

- Must meet all three criteria:
 - Any natural person
 - Initiate, alumnus, or affiliate of the Theta Omicron Chapter of Kappa Alpha Psi Fraternity, Inc. at UNC-Chapel Hill
 - Minimum *\$50 gift per year or achieve Lifetime giving status

Benefits of Affiliation

Donors

- Public info and communications
- Alignment with the TOF mission
- Gifts may qualify as a charitable deduction for federal income tax purposes
- Recognition

Members

- **Voting** (e.g. Officers, Directors, Annual General Meeting)
- Public and **Member** info and communications
- Alignment with the TOF mission
- Gifts may qualify as a charitable deduction for federal income tax purposes
- Recognition



Giving Level Descriptions

1976 Charter Society

In honor of the May 8, 1976 charter of the Theta Omicron Chapter of Kappa Alpha Psi Fraternity at the University of North Carolina at Chapel Hill

Howard C. Barnhill Society

In honor of Howard C. Barnhill Sr. who was a member of Kappa Alpha Psi Fraternity, Theta Omicron chapter advisor, and Laurel Wreath Award recipient from Kappa Alpha Psi Fraternity

Hayden B. Renwick Society

In honor of Hayden B. Renwick who was a member of Kappa Alpha Psi Fraternity, Theta Omicron chapter advisor, and Associate Dean who was committed to the recruitment, retention, and graduation of minority students at UNC

Legacy Society

A giving level dedicated to planned giving. A planned gift is any major gift made in a lifetime or at death as part of a donor's overall financial and or estate planning.



Giving Level Descriptions

Friends of Theta Omicron

Enhanced support for the Theta Omicron Foundation

Supporter

Entry level support for the Theta Omicron Foundation

***Undergraduate**

Available for undergraduate Members

***Senior**

Available for Members age 60+

*Available only to Members

DONOR Giving Levels

<u>LEVEL</u>	<u>AMOUNT</u>
1976 Charter Society	\$ 1,976
Howard C. Barnhill Society	\$ 5,000
Hayden B. Renwick Society	\$ 2,500
Legacy Society	\$ 10,000
Friends of Theta Omicron	\$ 100
Supporter	\$ 50

MEMBER Giving Levels

<u>LEVEL</u>	<u>AMOUNT</u>
1976 Charter Society	\$ 1,976
Howard C. Barnhill Society	\$ 5,000
Hayden B. Renwick Society	\$ 2,500
Legacy Society	\$ 10,000
Friends of Theta Omicron	\$ 100
Supporter	\$ 50
*Undergraduate	\$ 25
*Senior	\$ 25

MEMBER Giving Levels

<u>LEVEL</u>	<u>AMOUNT</u>	<u>MEMBER TERM</u>	<u>COMMENTS</u>
1976 Charter Society	\$ 1,976	Lifetime	\$500 min by 2018, balance by 2019 Availability to be retired 12-31-2019 <u>Not cumulative</u>
Howard C. Barnhill Society	\$ 5,000	Lifetime	\$250 min per year. Cumulative
Hayden B. Renwick Society	\$ 2,500	Lifetime	\$250 min per year. Cumulative
Legacy Society	\$ 10,000	Lifetime	\$10,000 min
Friends of Theta Omicron	\$ 100	1 year	
Supporter	\$ 50	1 year	
*Undergraduate	\$ 25	1 year	
*Senior	\$ 25	1 year	



MEMBER Recognition

As of 2-10-2019

Society Giving

1976 Charter Society

- Louis A. Newsome, F '75*
- DeSota A. Wilson, F '76
- Derrick S. Boone, Sr., F '77*
- Kelvin C. Harris, S '79*
- Hugh A. Holston, F '79*
- Curtis A. Jackson, F '79*
- Elbert L. Avery, F '79
- Kenneth A. Ward, F '81*
- Anthony D. Simons, F '81*
- Kevin D. Mason, F '85*
- William Lawrence, S '86*
- John S. Selden, S '93
- C. Leevy Johnson, F '93
- Eric L. Johnson, F '93*
- Johnny E. Artis, F '93*
- Terry L. Wallace, F '93*
- Edward F. Hanes, Jr., F '93*
- Kwame T. Jackson, F '93
- Jonathan S. Holston, F '09*
- Kelvin M. Anthony, F '11*

Society retired as of 12-31-2018

Howard C. Barnhill Society

Eric Davis, Afl*

Hayden B. Renwick Society

William Bynum, F '77*
Kwame T. Jackson, F '93*

Archie W. Ervin Society

Legacy Society

General Giving

Friends of Theta Omicron

Eric H. Butcher, S '05

Supporter

Undergraduate

Senior

*-Subscribing S-Spring F- Fall Afl- Affiliate



DONOR Recognition

As of 1-13-2019

Society Giving

1976 Charter Society

Howard C. Barnhill Society

Hayden B. Renwick Society

Legacy Society

General Giving

Friends of Theta Omicron

Julia Greer

Supporter

Undergraduate

Senior

*Subscribing

Next Steps

Recruitment: New Members

Awareness: Asset Inventory of Members

Outreach: Member Survey

Value: Build out Recognition Programs

Why Give to the Theta Omicron Foundation?

BECAUSE WE...

- Care about education and can make a difference
- Support the recruitment, retention, and graduation of under-represented students
- Inspire and support the next generation of leaders
- Honor the legacies of Howard C. Barnhill and Hayden B. Renwick
- Can help secure charitable legacies with gifts that last forever

We are proud to be the Theta Omicron Foundation!



Programs & Strategy

- **Diversity & Inclusion Symposiums**
- **Middle Eastern Province Kappa League Summit**
- **Kappa Scholars Program**
- **Philanthropy**



Membership Involvement

- **Financial Support**
- **UNC Alumni Engagement Programs**
- **Alumni Chapter Involvement**
- **Identify Partnership Opportunities**
- **Communicate**
- **Represent TOF**

Membership Commitment Continuum

Ignorance

- May or may not recognize organization name.
- Not familiar with what organization does.

Awareness

- Has heard of the organization.
- Recognizes the name of the organization.
- Has a rough idea of what the organization does.

Interest

- Shares the value of the organization.
- Believes the organization's cause is a good one.
- Likely to read/scan the organization's materials.
- May contribute occasional small gifts relative to financial capacity.

Experience

- Has seen/heard/felt results of the organization's work.
- Knows the people leading the organization.
- Attends organization's activities and events.
- Believes in organization's methods.
- Believes in organization's leadership.
- Likely to contribute repeated gifts relative to financial capacity.

Participation

- Participates in organization's activities and events.
- Takes on leadership roles when asked.
- Serves on committees when asked.
- Goes beyond financial support to contribute time and energy.
- Feels like a part of the organization.
- May contribute major gifts for special projects when asked.

Ownership

- Volunteers to take on leadership roles when need arises.
- Volunteer to serve on committees.
- Continually seeks new ways to advance the organization's mission.
- Considers the organization's mission to be my own personal mission.
- Likely to make repeated major gifts for special projects when asked.
- Will invest a large percentage of philanthropy in the organization.



THANK YOU

We appreciate you attending the Inaugural Annual General Meeting of the Theta Omicron Foundation!

We look forward to your continued support for our programs and contributions to our outcomes as we focus on:

Building A Better World - One Student At A Time