

# 2019 Annual Report

of the



Saturday, October 26, 2019  
11:00 am - 1:00 pm

University of North Carolina at Chapel Hill  
UNC Student Union  
Room 3205

***Building A Better World - One Student At A Time***



THETA OMICRON  
FOUNDATION

## Annual General Meeting

October 26, 2019

### Agenda

**Introductions**

All

**Welcome**

Christopher

Cohen Jr.

Polemarch, Theta Omicron Chapter

**Occasion**

Louis

Newsome - President

**Treasurer's Report**

Kelvin Anthony -

Treasurer

**Secretary's Report**

Terry Wallace -

Secretary

# Christopher Cohen Jr.



**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.



## 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 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

## 2019 Events & Highlights

<b>Website Visits</b>	9,123 visits
<b>Social Media</b>	Twitter LinkedIn Facebook
<b>1976 Charter Society</b>	Retired, December 31, 2018
<b>Archie W. Ervin Society</b>	New Giving Level Society introduced
<b>IRS Form 990</b>	Filed for annual compliance for charitable organizations
<b>Membership Survey</b>	Began to asset inventory of members/prospective members
<b>Pathways TO Leadership</b>	Key service initiative introduced
<b>UNC Center for Global Initiatives (CGI)</b>	Collaboration to increase minority participation in study abroad
<b>2019 BAR ad</b>	Sponsored ad in 2019 UNC BAR Souvenir Journal





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



## Pathways **TO** Leadership

**Program Description:** TOF to conduct 'Pathways to Leadership' events throughout the state of North Carolina. These events will consist of presentations and panel discussions in collaboration with successful members of the Theta Omicron Chapter of Kappa Alpha Psi Fraternity from various professions and vocations. Summits may also include college tours and information on preparation for college and future career choices. We will also survey participants of these Summits in order to continuously develop programs and activities that they feel will advance our program objectives.



## UNC Center for Global Initiatives (CGI) TOF Partnership

Aligned with UNC's Academic Plan, which prioritizes 'equity and inclusion' and 'global engagement,' the Center for Global Initiatives is spearheading a major pan-university effort to significantly increase the number of traditionally under-served students who have access to global opportunities.

A TOF partnership with CGI presents an opportunity for the Foundation to build relationships with important University stakeholders who have the assets to help us bolster our commitment to advance the objective of our organization. The program/partnership should produce measurable results. It is scalable and expandable. It could serve as the impetus for our marketing activity and attract donors who share the University's belief that a global experience is a necessary and relevant component of a contemporary college education. This is a unique and distinct **opportunity for the Foundation.**



### Purpose:

- Develop Strategy On Use of Theta Omicron Foundation Funds
  - Strategy pertains to what, when and how to use the funds
- Of the funds on hand an annual operating budget of \$5,000 will be set aside to allow the Theta Omicron Foundation to operate for five (5) years
  - \$1,000 per year for administrative expenses
  - \$1,000 per year for program costs
- The remaining funds are to be deposited into an interest bearing account on 1/1/2020:
  - managed by the Investment Committee (members TBD), subject to board approval
  - Funds will be allowed to grow for at least three(3) years before being used to provide administrative and program support
  - The amount withdrawn will be 4.0% of the rolling three-year average year-end balance in the account

### Next Steps:

- Develop goals for additional Brothers participating in the Theta Omicron Foundation
- Marketing to develop 'Friends of Theta Omicron Foundation' list for donations
- Develop an annual solicitation goal for the Foundation
- Specify campaigns that don't have an amount designated for giving
- Determine what activities motivate giving

## Objectives

### → Create Awareness

- ◆ Ensure members and other organizations understand the mission and goals
- ◆ Leverage resources for advertising and tie-ins with other organizations' platforms that align with the Theta Omicron Foundation's mission

### → Facilitate Support

- ◆ Social Media
  - Twitter
  - Facebook
  - LinkedIn
- ◆ Leverage QR codes and website address in publications and access



The image shows a 2019 BAR ad for the Theta Omicron Foundation. At the top is the foundation's logo and tagline: "Building A Better World, One Student At A Time". Below this are four photographs showing groups of people, likely students and staff, in various settings. The ad includes sections for "Our Mission" (fostering intellectual, ethical, social and moral development), "Our Goal" (increasing applications and graduation rates for male students of color), and "Leadership" (a grid of seven portraits of board members). A "Ways To Give" section lists several partner organizations: Howard C. Barnhill Society, Hayden B. Renwick Society, Archie W. Ervin Society, Legacy Society, and Friends of Theta Omicron. The website address www.thetaomicronfoundation.org and a QR code are also present.

## 2019 BAR ad Theta Omicron Foundation



## 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. **(NOT ACCEPTING NEW MEMBERS AS OF 1-1-19)**

### 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



### Archie W. Ervin Society

In honor of Archie W. Ervin who was a member of Kappa Alpha Psi Fraternity, Theta Omicron chapter advisor, and Associate Provost and Chief Diversity Officer who was committed to diversity, inclusion, and achievement for all 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
Archie W. Ervin Society	\$ 1,250
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
Archie W. Ervin Society	\$ 1,250
Legacy Society	\$ 10,000
Friends of Theta Omicron	\$ 100
Supporter	\$ 50
*Undergraduate	\$ 25

\*Senior





# MEMBER Recognition

As of 10-1-2019

## Society Giving

### 1976 Charter Society

- Louis A. Newsome, F '75\*
- DeSota A. Wilson, F '76
- William Bynum, F '77\*
- 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 not accepting new members**

### Howard C. Barnhill Society

- Eric Butcher, S '05
- Kevin Jones, F '81\*

### Hayden B. Renwick Society

- Eric Davis, Afl\*
- Kwame T. Jackson, F '93\*
- Roy Flood, F '83\*

### Archie W. Ervin Society

- Archie W. Ervin, '95\*

### Legacy Society

## General Giving

### Friends of Theta Omicron

#### Supporter

#### Undergraduate

#### Senior

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



## Website / IT

2019 Monthly Totals				Average Daily Totals		
Month	Unique Visitors	Number of Visits	Pages	Average Daily Users	Average Daily Visits	Average Daily Pages
Jan	305	702	1776	10	23	57
Feb	264	609	1161	9	22	41
Mar	769	1480	2887	25	48	93
Apr	496	861	1623	17	29	54
May	749	1198	2602	24	39	84
Jun	637	1346	4519	21	45	151
Jul	353	669	2651	11	22	86
Aug	413	742	2570	13	24	83
Sep	453	808	2834	15	27	94
Oct	407	708	2443	13	23	79
<b>Totals</b>	<b>4846</b>	<b>9123</b>	<b>25066</b>	<b>16</b>	<b>30</b>	<b>82</b>

# 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, Hayden B. Renwick, and Archie W. Ervin
- Can help secure charitable legacies with gifts that last forever

**We are proud to be the TO Foundation!**

- The TOF will be forming an Investment Committee to help manage the investable assets of the Foundation
- To be formed by soliciting interest from members via the routine member surveys (seeking members with a finance and investing background)
- Will be charged with investing the donor/member contributions for maximum return potential while also minimizing the risk profile

# 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*

