



# 2008 Annual Report

## Mortar Board Digest

The following are Mortar Board activities for the period of Nov. 1, 2007 through Oct. 31, 2008:

- 5,884 members were initiated into 198 active, collegiate chapters
- 92 percent of those asked accepted the honor of becoming a member of Mortar Board
- 86 honorary members were inducted by chapters
- 65 gift memberships were granted to those in financial need
- 230 members continued their collegiate membership and involvement for more than one year
- 320 alumni members committed to support Mortar Board through sustaining dues, more than half of those as lifetime members

This annual report serves as an affirmation of the founding of Mortar Board in 1918. The ideals of scholarship, leadership and service continue as the common thread through which each member and chapter is able to establish their own unique service projects and develop their own leadership programs and partners, tailored to meet the needs of their own communities.

## From the National Office

The 2007-2008 fiscal year continued to provide some significant opportunities and challenges for both Mortar Board, Inc. and the Mortar Board National Foundation. Members and alumni continue to experience the great things active Mortar Board chapters and alumni are doing through a variety of channels such as electronic newsletters, social media, online social and career communities, along with the *Forum*.

Mortar Board's national initiative is "Reading is Leading." This year, 46 of Mortar Board's collegiate chapters rose to the challenge of a first-time Virtual Book Drive. Held July 26 through Oct. 15, this effort resulted in \$25,586.24 to help the non-profit organization First Book provide children from low-income families with the opportunity to read and own their first new books.

The Mortar Board National Council wishes to thank Martha Burns Anderson and Al Fisher for their service as leaders during the 2007-2008 year. The national leadership team also welcomed Jane Beyer and Joseph Rodriguez as new members elected at the 2008 Mortar Board National Conference held in Columbus, Ohio.

The Mortar Board National Foundation distributed a record \$60,000

in fellowships this year, along with an additional \$10,000 in funding for special chapter projects. Current economic conditions have adversely affected the ability to maintain the record distribution levels for the coming year, and future fundraising will play a major role in providing funds to alumni furthering their education.

A new vehicle called the Chapter Endowment Program was established for providing donors with the ability to establish their own fund within the Mortar Board National Foundation, ultimately benefiting a local chapter of their choice. Affinity relationships and sponsorships with generous partners such as GEICO, UnitedHealthcare StudentResources and College Loan Market remain critical in helping to fund Mortar Board leadership development, chapter project grants and fellowships. The National Foundation would like to thank Judy Lewis Logue, who ended her term as a National Foundation trustee this year after many years of service and advocacy. Denise Rode was welcomed as a new trustee during the year.

The Mortar Board National Foundation granted \$9,308 to chapters in support of special projects or initiatives during the 2007-2008 fiscal year. The following chapters were awarded with grants:

- University of Arizona
- University of Arkansas
- Bowling Green State University
- Carleton College
- Carnegie Mellon University
- Carson-Newman College
- University of Cincinnati
- Drury University
- Florida State University
- Fort Hays State University
- Hood College
- Kansas State University
- Lyon College
- University of Maryland
- Northern Arizona University
- Queens University of Charlotte
- Rhodes College
- Salem College
- Seattle Pacific University
- University of South Alabama
- University of South Florida
- Tulane University
- Valparaiso University
- Washington University in St. Louis

- William Jewell College
- University of Wyoming
- Xavier University

Fellowships ranging in amounts from \$3,000 to \$10,000 were distributed to 15 members in pursuit of graduate or professional degrees by the Mortar Board National Foundation Fund:

- Cindy Bethel, University of South Florida, Washington State University Mortar Board Classes of 1945-1950 Fellowship
- Kimberly Blezien, Ohio Northern University, College Loan Market/Mortar Board Fellowship
- Melissa Elafros, Michigan State University, Mary Elizabeth Ramier Fellowship
- Danielle English, Kansas State University, GEICO Fellowship
- Kirsten Freeman Fox, The Ohio State University, Barbara Cook Fellowship
- Nicole Hannemann, Texas Tech University, Ellen North Dunlap Fellowship
- Amanda Hong, Case Western Reserve University, UnitedHealthcare StudentResources/Mortar Board Fellowship
- Donny Kakati, University of South Alabama, Zelma Patchin Fellowship
- Chase Knowles, University of California, Los Angeles, Mortar Board Fellowship in honor of Judith Lewis Logue
- Eniola Mafe, Spelman College, Mortar Board Fellowship in honor of Martha Burns Anderson
- Joan-Marie Manolakis, University of Alabama, Mortar Board Fellowship in honor of Al Fisher
- Maureen Mork, The Ohio State University, Ruth Weimer Mount Fellowship
- Ian Neel, San Diego State University, Mortar Board Diane Selby Fellowship
- Jeannie Nguyen, University of Washington, Katherine Wills Coleman Fellowship
- Laura Twilling, The Ohio State University, Mortar Board Fellowship

Mortar Board continues to expand with the installation of the 225th chapter at The University of Findlay in Findlay, Ohio and the 226th chapter at Lenoir-Rhyne University in Hickory, N.C.

At a critical time when cultivating young leaders is so important to the global community, it is paramount for Mortar Board members and alumni to continue financially supporting a respected national organization that has made a significant difference personally, professionally and within our own communities, across the globe. Economic times are tough. Mortar Board has weathered the storm over the last 91 years because of the caring and generous support of their peer selected members. With your help, Mortar Board leaders chosen for service can help calm the storm of today and provide some incredible opportunities for tomorrow.

Here's to another great year,



Jon Cook  
Former Executive Director

*Editor's Note: The Mortar Board National Council and National Foundation have launched a search for the society's next executive director. Megan Stevens will serve as interim executive director during this transitional period. More information regarding the search will be posted online at [www.mortarboard.org/EDsearch](http://www.mortarboard.org/EDsearch).*

## Mortar Board annual wish list

The National Office continues to operate prudently, with a minimal amount allocated to administrative resources and overhead.

If you can assist with making any of wishes come true, please contact the Mortar Board National Office:

- Development and grant-writing skills and assistance with research and writing of proposals for priority projects within the organization
- One new computer capable of running graphic design software
- One new server for small business
- Incentive items to be given away on the Web site for e-mail list sign-ups, such as trips, MP3 players, auto leases or services
- Copy paper stock
- Small microwave
- Small refrigerator with freezer
- Surplus airline miles - to be used for chapter visits, alumni events, chapter installations
- Generous hosts/hostesses and meeting space for alumni and chapter gatherings
- Office furniture
  - Occasional (meeting) chairs
  - Coffee tables
  - Lamps

# Annual Financial Position

Nov. 1, 2007 - Oct. 31, 2008

## Mortar Board, Inc.

### Revenue

Membership Dues <sup>1</sup>	\$353,475
Fees	\$39,312
Contributions/Grants	\$30,000
Investment income	\$41,429
Other	\$2,661
<b>Subtotal</b>	<b>\$466,877</b>

### Expenses

Programs	\$405,611
Management	\$90,097
<b>Subtotal</b>	<b>\$495,708</b>

### Total Assets

Unrestricted	\$462,346
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<sup>1</sup>\$370,000 in membership dues was budgeted for 2007-2008; actual revenue fell short.

Mortar Board, Inc. was founded in 1918. It is incorporated in the state of Indiana and is a recognized non-profit, tax-exempt 501(c)(3) organization.

## Mortar Board National Foundation Fund

### Total Assets

All restricted and unrestricted \$676,895

During the 2007-2008 fiscal year, the Mortar Board National Foundation distributed \$60,000 in fellowships to Mortar Board members. This represented a one-time increase of \$30,000 in fellowship funding. This distribution, coupled with a loss in investments, caused the total assets of the Mortar Board National Foundation to drop to \$676,895. A more detailed report on the Mortar Board National Foundation will appear in the fall issue of the *Mortar Board Forum*.

The Mortar Board National Foundation Fund was established in 1955 to award graduate fellowships and university chapter grants and to support the programmatic mission of Mortar Board, Inc. It is incorporated in the state of Ohio and is a recognized non-profit, tax-exempt 501(c)(3) organization.

### Mortar Board Foundation Fund permanently endowed funds:

- Ellen North Dunlap Fellowship
- Gail Harrison Corvette Leadership Endowment
- Katherine Wills Coleman Fellowship
- Mary Elizabeth Ramier Fellowship
- Mortar Board General Fellowship
- Mortar Board, Inc. Diane Selby Fellowship
- Ruth Weimer Mount Fellowship
- Washington State University Classes of 1945-1950 Fellowship
- Zelma Patchin Fellowship

### Other fellowships governed by agreement:

- Mortar Board, Inc. (2 percent of new membership fees)
- Purdue Chapter Fellowship in honor of Barbara Cook

### Temporarily restricted funds:

- Tolo Foundation
- Mortar Board, Inc. (4 percent of dues to leadership initiatives)

# Thank you, donors!

The following are those individuals who have generously supported the ideals of Mortar Board from Jan. 1, 2008 through Dec. 31, 2008.

**Agnes Scott College**

Mary Rae Phelps  
Elizabeth Witt

**The University of Alabama**

Lane Nestman

**University of Arizona**

Helen Kroese  
Gregory Ziebell

**Auburn University**

Martha Vardeman

**Birmingham-Southern College**

Marilyn Brown  
Maude Collier  
Anne Meyercord  
Jean Pierce

**Bowling Green State University**

Lee Meserve  
Janice Sayers

**Bradley University**

Michael Wilczynski °

**University at Buffalo**

Susanne Wood

**Butler University**

Susan Allen

**University of California, Los Angeles**

Bonnie Nidever

**University of California, Santa Barbara**

Mary R. Kenaston

**Case Western Reserve University**

Susan Runkle

**Chatham University**

Judy Evans

**University of Cincinnati**

Carol Ann Norton

**Colorado State University**

Ann Yates

**University of Connecticut**

Margaret Murray Hinkle

**Cornell University**

Mary Jo Coe  
Bette Morris  
Kathryn Shaw  
Maria Sperando

**Denison University**

Nicole Braden Lewis  
Angela Seaworth

**The University of Denver**

Andrea Richardson  
Joan Stearns

**DePauw University**

Joyce Allen

**Drake University**

Norma Lawler

**Eastern Michigan University**

Lois MacDonald

**University of Evansville**

Susan Worthington

**University of Florida**

Amelia Carew

**Hope College**

Nancy Swinyard

**Illinois State University**

Jon Kindseth

**University of Illinois**

Rochelle Elliott  
Mary Alice James

**Indiana State University**

William Niederer

**Indiana University**

Alice Sievert

**The University of Iowa**

Sue Davidson  
Mary Ladd Loots  
Marjorie Pohl  
Marilyn Wirtz

**Kansas State University**

Martha Starling \*

**University of Kentucky**

Helen McBride  
Donalene Sapp Poduska

**Knox College**

Barbara Adams  
Mary Alice Yund

**Lawrence University**

Margaret Humleker  
Betty Messenger

**University of Maryland**

Hari Sachs

**Miami University**

Nancy Evans  
Ruth Pifer

**The University of Miami**

Stephanie Kermer  
Gloria Scharlin

**Michigan State University**

Jane Moulton  
Doris Ponitz  
Nelda Stuck

**Middlebury College**

Joyce Cropsey

**University of Missouri - Columbia**

Linda Headrick Setzer

**University of Missouri - Kansas City**

Beth Smith

**University of Montana**

Barbara Roache

**The University of Nebraska - Lincoln**

Janet Beckmann  
Sue Ann Tempero

**The University of New Mexico**

Deborah Gaunt  
Cornelia Lange

**KEY**

\* \$500 - \$999

° \$1,000 - \$4,999

~ \$5,000 or more

**University of North Dakota**

Patricia MacKowiak

**University of North Texas**

Alta Birdsong

**Northern Illinois University**

Patricia E. MacWhorter

Denise Rode \*

**Northwestern University**

Barbara Marsh

Judith Mich

**The Ohio State University**

Elaine Barnum

Patricia Bazler

Ann Bish

Shirley Bowser

Shirley Brooks-Jones

Jean Carr

Sheila Castellarin

Gail Corvette °

Mary Lou Fairall

Anne Foltz

Virginia Gordon

Marjorie Lasko

Christina Lawless

Marilu Moye \*

Barbara Payson

Jane Rector

Diane Selby \*

Constance Weakley

**Ohio University**

Betsy Burke

Marilyn Paulsen

**Ohio Wesleyan University**

Shirley Hook

Marilyn Musselman Ledebuhr

Sarah Timmons

Charlot Wade

Marilyn Wearda

Betsy Whitney

**Oklahoma Baptist University**

Karen Stewart

**The University of Oklahoma**

Patricia Delaney Snider

Bonnie Kennedy \*

Patricia Riggs

Trisha Rudder

Betty Young

**Oregon State University**

June Bashkin

Mary Bragg

**The Pennsylvania State University**

Barbara Arnold \*

Janet Blew

Carol Carberry Kalos

Kathryn Cochrane

Marjorie Felsburg

Joanna McQuaide

David Schuler

**Pomona College**

Huey Merchant

**Purdue University**

Barbara Brenner-Rosengard

Phyllis Gladden

Robert and Linda Sorensen \*

**University of Redlands**

Heather Hendry

Cara Taylor

**University of Richmond**

Martha Carpenter

Elizabeth Cheyney

Betty Ann Dillon

Helen Luke \*

Elisabeth Wray

**San Diego State University**

Marilyn Ackroyd

Jeanne Nelson Johnson

**Southern Nazarene University**

Wanda Rhodes

**University of Tennessee at Knoxville**

Cheryl Gunter

**Texas Tech University**

Catherine Evans

Dottie Phillips

Ruth Smith

**The University of Texas at Austin**

Susan Beisert

Randall W. Crim

**The University of Tulsa**

Nicole Affeldt

Clinton Rataczak

**The University of Vermont**

Lola Smith

**Washington State University**

Genevieve DeVleming \*

Margit Jackson

Maxine Semmel

Betty Jo Sorensen

**Washington University in St. Louis**

Joan Sessel

**University of Washington**

Betty Corker

Betty Vitousek

Lucy Werner

**Wesleyan College**

Susan Walker

**West Virginia University**

Jane Smith

**Whitman College**

Ann Willard

**Wichita State University**

Marjorie Blodgett

**College of William and Mary**

Barbara Borst

**William Jewell College**

Mary Lou Reynolds

**University of Wyoming**

Sally Steadman °

Martha Wyrsh

**Foundations and corporations**

Bank of America ~

Blossom Express, Inc. °

BP Fabric of America

College Loan Market °

GEICO ~

W.K. Kellogg Foundation

Mortar Board, Inc. ~

UnitedHealthcare StudentResources °

**KEY**

\* \$500 - \$999

° \$1,000 - \$4,999

~ \$5,000 or more

**Collegiate and alumni chapters**  
Miami Mortar Board alumni chapter  
Monmouth Mortar Board alumni chapter  
Purdue University Barbara Cook chapter °

**Non-Mortar Board donors**

Jill Chase  
Candace Platz  
Harry Mueller

**In honor of Eleanor Buzby Acker**

Marjorie Felsburg

**In honor of Barbara Arnold**

Diane Selby \*

**In honor of Gladys Eddy**

Ann Yates

**In honor of Catherine Evans**

Diane Selby \*

**In honor of Mabel Freeman**

Diane Selby \*

**In honor of Jon Kindseth**

Jon Kindseth

**In honor of Kay MacKenzie**

Diane Selby \*

**In honor of Dottie Moser**

Diane Selby \*

**In honor of William Niederer**

Dottie Phillips  
Diane Selby \*

**In honor of Dottie Phillips**

Diane Selby \*

**In honor of Shana Platz**

Candace Platz

**In honor of Jean Proffitt**

Elisabeth Wray

**In honor of Cathy Randall**

Diane Selby \*

**In honor of Denise Rode**

Diane Selby \*

**In honor of Diane M. Selby**

Dottie Phillips  
Doris Ponitz  
Denise Rode \*  
Gregory Ziebell

**In honor of Rosa Neil Schenk**

Marjorie Pohl

**In honor of Sally Steadman**

Lane Nestman

**In honor of Ati and Maryam Tofigh**

Bonnie Nidever

**In honor of David Worthington**

Susan Worthington

**In memory of Lee Allen**

Jeanne Nelson Johnson

**In memory of Mary Garrett Brown**

Marilyn Brown

**In memory of Mary Hudzikiewicz**

William Niederer  
Sally Steadman °

**In memory of Maxene Graham**

Miami Mortar Board alumni chapter

**In memory of Walter Jureski**

Miami Mortar Board alumni chapter

**In memory of Elizabeth Marsh**

Barbara Marsh

**In memory of Florence Tenner Mueller**

Harry Mueller

**In memory of Ruth Weimer Mount**

Denise Rode \*

**In memory of Ralph Sperando**

Maria Sperando

**In memory of Josephine Rice Williams**

June Bashkin

**Become one of Mortar Board's valued donors today**

*Donations may be also be made by phone at 1-800-989-6266 or online at [www.mortarboard.org/donate](http://www.mortarboard.org/donate)*

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State ZIP: \_\_\_\_\_

Primary e-mail address: \_\_\_\_\_

Secondary e-mail address: \_\_\_\_\_

I wish to make a gift of:  \$500  \$150  \$50  Other \$ \_\_\_\_\_

**Method of payment**

Check (Please make payable to Mortar Board National Foundation)

Credit card:  VISA  MasterCard  American Express  Discover

Card number: \_\_\_\_\_ Expiration (Month/Year): \_\_\_\_\_

In memory of: \_\_\_\_\_

In honor of: \_\_\_\_\_

**My gift is to support (choose one of the following):**

- Leadership initiatives through national conference programs and awards
- Collegiate chapter community service through chapter project grants
- The greatest need within Mortar Board
- Mortar Board fellowships

**WAIT!**

Don't forget to tell Mortar Board about yourself! On a separate sheet of paper, let us know what you do for a living, any accomplishments, life changes, or interest in getting involved.