

## ANNUAL REPORT FISCAL YEAR 2015

### Collegiate Chapters and Members

Mortar Board has 174 collegiate chapters. There were 4,664 collegiate members initiated in 2015, compared with 4,958 the year before (Initiates for 2016 will be reported next year after the statement of financial position is completed in July 2017). Paid initiate numbers are declining even as the National Council, section coordinators, and staff help chapter leaders use effective tools to showcase Mortar Board on campus and encourage selection of members from all parts of campus.

The number of continuing seniors increased by 20% over last year (to 223), with chapters paying greater attention to these members who bring invaluable expertise to chapter management.

Mortar Board leaders at Mississippi State University reinvigorated the Centennial chapter in 2016. Efforts to reinvigorate the University of Connecticut have been put on hold while the administration assigns advisors. There were no new chapters installed in 2015 or 2016.

The number of honorary members, selected by collegiate chapters or the National Council, increased in 2015 to 69 honorary members selected by 35 chapters. Last fiscal year, 56 were selected by 29 chapters. Mortar Board is proud to claim these members.

### The Mortar Board Alumni Association and Alumni Chapters

There are 374 members of the Mortar Board Alumni Association. Mortar Board's 15 alumni chapters continue programming beneficial to their members and helpful to collegiate chapters near them. A new chapter has begun in Los Angeles. Congratulations to energetic leader Tatiana Nemanim (UCLA, 2012) for clever programming and communication to make that possible.

As Mortar Board has turned 99 years old, membership in the MBAA is of greater importance than ever before. We need volunteers at all levels. Membership, which is annual (\$45) or for a lifetime (\$600), includes a subscription to both the print and digital issues of the Mortar Board *Forum*. MBAA members have been valuable volunteers for national operations like individual and chapter award reviews.

### Awards to Chapters and Advisors

In 2016 the Ruth Weimer Mount Chapter Excellence award was earned by Hypatia at The University of Alabama, making it the first southeastern chapter to join the illustrious club of 13 that have received the top honor in the RWM's 15-year history.

Hypatia celebrated its achievement by starting a chapter endowment in the Mortar Board National Foundation. This is an action that is open to all collegiate chapters, so if this piques your interest, please let the National Office staff know!

The Cap & Gown chapter at the University of Mary Washington received the Most Improved Chapter honors. Congratulations to the leaders of that group, especially outgoing president Angela Dixon. Thanks to the endowed monies now available in the Freeman and Fox Chapter Revitalization Fund, future most-improved chapters will receive a cash gift to add to their treasuries! You can add to this fund by designating a gift to the Freeman-Fox Fund. (Read more about the fund founders of this endowment in the Winter 2017 issue of the *Forum*).

Mary Washington's success extended to an Excellence in Advising Award presented to Dr. Abbie Tomba (who also became an honorary member); Dr. Jen Weghorst (Miami University, 1996), a member of the MBAA and a Certified Organization Advisor (who is senior advisor for the University of Kansas' Torch chapter); and Jenna Vitosh (University of Nebraska-Lincoln, 2006) and Jerry Stevens (Texas Tech, 2008) who advise their own chapters' (Black Masque and *Forum*, respectively) advisor teams with style and foresight.

See the Summer 2016 issue of the *Forum* for complete coverage of all conference winners.

### Awards to Alumni in 2016

United States Marine Corps 2LT Spencer Shaffer (Ohio State, 2011) earned the Emerging Leader Award. Stationed overseas, he delivered an inspirational acceptance by video from his command office.

Alumni Achievement Award recipients Sarah (Sally) Smith Larson (Monmouth College, 1972) and Debra Levin (Arizona State University, 1986) demonstrated their love for our Society with heartfelt acceptance speeches that showed the reasons that they have achieved great career heights.

### National Conference

The leadership opportunities for new chapter delegates at the 2016 National Conference in Indianapolis were varied and well rated. Attendance remains steady at around 250 members. Advisor programming and Mortar Board's signature LEAD program for advisor education were well attended. Mortar Board's 2017 national conference is August 5-6 in Phoenix.

### National Council and Governance

Under the leadership of National President Abigail G. Diehl (Penn State, 1995) the National Council has undertaken initiatives based on the Society's strategic plan and results of the Futuring Task Force, chaired by Dr. Bob Sorensen (Purdue, 2000).

At the 2016 Special National Conference, Katie Chick (Hood College, 2006) was re-elected vice president of the National Council and Brandon M. Caten (University of South Alabama, 2011) alumni representative. Robbie Kichak (University of Cincinnati, 2014) was elected student representative at the National Conference. All three of these leaders have been collegiate chapter presidents.

### Mortar Board National Foundation

Dr. Marty Starling (Kansas State, 1960), the chair of Mortar Board's Centennial Campaign, and MBNF President Dr. Denise Rode launched the public phase of the campaign with the news that since the preliminary goal of \$750,000 had already been reached, the new target was \$1 million. In 2016, donors helped us surpass that million-dollar target. The campaign ends in December 2018, so opportunities abound for new donations. The 1918 Society, Mortar Board's new giving group reached 123 members. Membership belongs to those whose cumulative donations to MBNF since the campaign began are \$500 or more. Six new members have been admitted to The Tapping Society.

The MBNF began eleven new endowments in 2016 (six in 2015) and the Paula Stuetzgen-UWEC-Gold Caps Centennial Endowment, the Julie and Roger Davis Fund, and the Freeman and Fox Chapter Revitalization Fund became fully endowed. Three fund founders increased pledges to their endowments. The generosity of donors is limitless!

Three chapter endowments (Alabama, San Diego State University and the Alumni Chapter of San Diego County) were initiated. The Purdue chapter endowment, called the Five Deans Fund, was established and became fully

endowed. Members of these chapters wishing to donate should call the National Office or go online.

Endowment funds for fellowships, plus nearly \$7,000 in additional gifts, allowed for \$40,000 to be distributed to eight fellows in 2016. Their accomplishments were highlighted in the Summer 2016 *Forum*.

The Foundation depends upon members' annual giving to add to endowed and operating funds and conducts an annual-giving campaign throughout the year. The Society is grateful for members' generosity. A list of donors for 2015 appears near this report.

## THANKS TO THE DONORS OF 2015

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\* Denotes giving of \$500 to \$999  
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<sup>BC</sup> Gifts in memory of Barbara Cook  
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## STATEMENT OF FINANCIAL POSITION FY 2015

### Mortar Board, Inc.

<b>Revenue</b>	
Membership dues/fees	\$385,105
Conference fees	88,919
Merchandise sales (net)	50,628
Corporate contributions	42,968
Foundation support	6,422
Individual contributions	1,416
Miscellaneous	1,077
Total revenue	\$576,535

<b>Expenses</b>	
Program services	\$466,857
Management/general	132,976
Fundraising	24,019
Total expenses	\$623,852

<b>Net income (loss)</b>	(47,317)
<b>Net investment income</b>	(3,784)
<b>Unrestricted net assets</b>	\$191,873

### Mortar Board National Foundation

<b>Revenue</b>	
Contributions	\$29,402
Endowments	80,560
Fees and royalty income	7,277
Total Revenue	\$117,239

<b>Expenses</b>	
Program services	\$61,813
Management/general	15,769
Fundraising	8,373
Total expenses	\$85,955

<b>Net income (loss)</b>	\$31,284
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<b>Net investment income</b>	(35,439)
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<b>Net assets</b>	
Unrestricted	\$142,777
Temporarily restricted	142,639
Restricted	953,376
Total net assets	\$1,238,792

Complete financial reports are available from the National Office.