

DELTA San Francisco - Peninsula FOUNDATION

2014 Annual Report

Message from the Chair



"Delta, a symbol for change, represents the spirit of the Delta San Francisco-Peninsula Foundation."

Bessie Stewart-Ross, Chair
Delta SF-Peninsula Foundation

A successful 2014 positions us to give more in 2015.

This year our gross income was \$48,508.31, and we netted \$31,040.99. The Foundation provided scholarships to four deserving students. In addition, we hosted our **fifth** annual Financial Fortitude Workshop for seniors and our Delta Academy, which was a huge success. We elected one new board member, Farralon Udom. It was a great year, and our success would not have been possible without you.

With the increase of the earned interest from our endowment, **scholarship recipients received a 25 percent increase** in the fall of 2014. Therefore, each scholarship recipient now receives \$2,500 for the academic year. It is the goal of the Foundation to give another increase in 2015. There are few scholarships that make an ongoing investment in students and provide them with financial assistance throughout their college education. We believe that the support we provide students reflects the Foundation's dedication to making education attainable for underserved youth. We hope that with your continued support we will be able to help even more students.

Thank you!

Every gift makes a difference in the lives of our scholarship recipients and the attendees of our Financial Fortitude Workshops for seniors and high school students. A special thanks to Katrina Logan, Esq., and Keith Ogden, Esq., Community Legal Services, for their input in helping us frame the day for our seniors' Financial Fortitude Workshop.

We are also grateful for the continued support of the East Palo Alto Senior Center and Lupe Lucero, Regional Manager, Stanford Credit Union, for her contribution to our Delta Academy workshop.

Special thanks to Danielle Moore Burton, Esq., who exited the board to join her husband in Southern California at the end of the year. Her legal expertise will be missed greatly.

Current Scholarship Recipients

Your generous support helps provide scholarships for college students like these:

CIERRA SHERMAN



Freshman
UC Santa Cruz
Undeclared

VICTORIA MILLS



Freshman
UC Riverside
Undeclared

AYELA JAMES



Junior
Dillard University
Theatre Arts

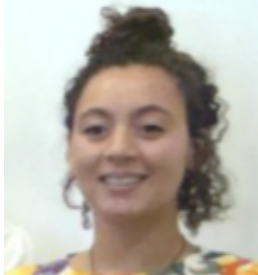
RAVEN TAYLOR



Senior
Howard University
Political Science

Recent Graduates & Past Recipients

ALYSSA TYREE



“I graduated from UC Santa Cruz with a bachelors in biology. Currently I am a Recruiting Coordinator at Google and I love it! Thank you to Delta Sigma Theta Sorority and the Foundation for all your help and support. I greatly appreciate it!”

- Alyssa Tyree, UC Santa Cruz, 2015

DEDRIANA LOMAX



2013 Graduate
Howard University

IMANI MCELROY, UC Irvine, 2012

ALLYSON COBB, N. Carolina AT&T University, 2011

VERONICA SMITH, UC Santa Barbara, 2011

JOYA DUPRE, Howard University, 2010

Our Generous Supporters

CORPORATE SPONSORS

Silver (\$2,500 - \$4,999)

Wells Fargo Foundation

Bronze (\$1,000 - \$2,499)

Charles & Ann Johnson Foundation, Delta Research & Educational Foundation, Union Bank Foundation, Stanford Credit Union

Patrons (\$50 - \$999)

San Mateo Credit Union

INDIVIDUAL CONTRIBUTORS

Gold (\$5,000 - \$9,000)

Evelyn Neely

Silver (\$2,500 - \$4,999)

Bessie L. Stewart-Ross, Janice Willis

Bronze (\$1,000 - \$2,499)

Barbara Brown, Danielle Moore Burton, Helen Kennedy Lazar, Bettye Price, Farralon Udom, Regina Wallace-Jones, Thurman White, Jr.

Patrons (\$20 - \$999)

Kikelomo Aluko, Dianne Berry, Taineisha Bolden, Kristen Bowden, Lucretia-del Broussard, Leona Bridges, Donielle Buie, Cole Cannon, Kathy Campbell, Altarine Campbell-Vernon, Sara Chang, Betty Chin, Loretta Cohen, Lillie Ryans-Culclager, Channon Dade, Gayle Davidson, Angel Davis, Renee Davis, Duafe, Peter Griffin, Cassandra Hambrick, Amber Hampton, Martin Harband, Lynetta Haynes-Oliver, Sir Jules Hayward, Jeanine Henry, Patricia JeanLouis-Knight, Theresa Johnson, Mavis Knox, Kim Lewis-Davis, Patricia McCambridge, Crystal Marie Mitchell, Samantha Moorer, Bridget Morgan, Wilma Morgan, Judith Ned, Kristine Parker, Ann Rarden, Charlie Ann Richardson, Karen Riley, Doris Rutland, Joseph Shackelford, Jon Sheilds, Jacqueline Sherman-Rustin, Susan Schofield, Mildred Swann, Shirley Tate, Mae Threadgill, June Uyenoyama, Stacy Washington, Edward Yang

In-Kind Donations

East Palo Alto Community Legal Services
Lillian Yvette Irvin for SavvyClick Marketing
Safeway Corporation
Starbucks

Get Involved

The Foundation awards monetary scholarships to graduating high school seniors for the purpose of motivating these deserving students to attend college. Eligibility for the scholarships requires students to demonstrate intellectual promise, good work habits, high character, and financial need. We invite you to join us in building better communities - one family at a time.

Volunteer

Share your time, talent and experience with one of our Delta San Francisco-Peninsula Foundation scholars.

Join the Board

Board members create the vision and strategy for the Foundation. If you are looking for a leadership role, Board membership may be for you.

Become a Strategic Partner

If you belong to a business or organization that shares our vision, strategic partnering can help you meet your goals while also helping the Foundation.

Donate

Your monetary contributions help fund scholarships for high school teens entering college. All donations are tax deductible. To donate online, please visit www.dsfpf.org or mail to 204 E. 2nd Avenue #308, San Mateo, CA 94403.

Financial Fortitude Workshop: Focus on Seniors



Sponsored by Wells Fargo Foundation, Charles and Ann Johnson Foundation, Stanford Credit Union, Union Bank, Thurman White, Jr., and Delta Research and Educational Foundation, our fifth annual Financial Fortitude Workshop was held on October 24, 2014, at the East Palo Alto Senior Center. The keynote speaker, Katrina Logan, Esq., spoke on "Financial Smarts for Seniors and Maintaining a Financially Healthy Lifestyle - Collection Defense and Avoiding Scams." In addition, a four-member panel discussed money management, loan smarts, long-term care, and adult care. Moderator Regina Wallace Jones, Yahoo, Inc., guided

the panel in a very thoughtful discussion. In addition, there were opportunities for one-on-one counseling in the areas of HIP (Shared Housing), Reverse Mortgage, Legal Aid for Seniors, and Estate Planning.

The panel presenters included the following: Christopher B. Luu, Wells Fargo Bank; Johnpaul LoNardo, Stanford Credit Union; Kathi Minden, MSW Rosener House/Adult Day Care; and Keith Ogden, Esq., Community Legal Services. Participants received the following helpful tips to assist them on their paths to financial freedom:

1. Don't blame the victim and don't be the victim.
2. Slow down and don't act immediately.
3. Never give away personal information.
4. Always get it in writing and READ it.
5. Tell your story.
6. Know the grandma scam.
7. Report identity theft to local police.
8. Find someone that you can trust.
9. When loved ones need additional help, do your research; every individual is different.





*5th Annual
Financial
Fortitude
Workshop*



Why I Give

One of the reasons I give to Delta is because of my commitment to this outstanding organization, as it was very instrumental in helping me to pay for expenses during my undergraduate days. It made the difference between buying textbooks for courses and using library copies with which to study. The sorority made a difference in learning about the world and the effects of networking with an exceptional organization, to which I am still committed.



Janice Willis

I give to the Foundation because I believe **the benefits of receiving a college education is well worth the investment!** Had it not been for the financial assistance I received in college, I could not have afforded to attend. Statistics show that students who obtain a college education are more likely to earn more money per year than those who do not attend.



Lillie Ryans-Culcalger

Bettye Shabazz Academy

The GEMS/Academy girls met at Saint Elizabeth Seton School in Palo Alto. The workshop was designed to give the girls and their mothers an opportunity for the following:



1. To consider the prevalence of materialism in the United States and the effects of materialism on individuals according research
2. To learn about the concepts of contentment and the practices and habits of people who report higher levels of satisfaction in their lives
3. To practice the zero-based method of budgeting



INCOME STATEMENT									
Year Ending December 31, 2014									
INCOME									
Donations									
	Member and Chapter Donations					\$	22,862.77		
	Community Donations					\$	11,445.00		
								\$	34,307.77
Investment Income									
	Interest					\$	13,553.37		
	Realized Capital Gains					\$	647.17		
								\$	14,200.54
Total Income								\$	48,508.31
EXPENSES									
Disbursements									
	Scholarships					\$	(10,165.00)		
								\$	(10,165.00)
Administrative Expenses									
	Jazz In Pink					\$	(1,759.77)		
	Foundation Expenses					\$	(700.00)		
	Accounting Expenses					\$	(610.00)		
	Postage and Shipping					\$	(420.00)		
	Website Expenses					\$	(478.48)		
								\$	(3,968.25)
Investment Expenses									
	Account Fees					\$	(1,503.78)		
	Unrealized Gain (Loss) on Investment					\$	(1,830.29)		
								\$	(3,334.07)
Total Expenses								\$	(17,467.32)
NET INCOME									
								\$	31,040.99

BALANCE SHEET									
Year Ending December 31, 2014									
ASSETS									
Checking Accounts									
	Bank of America (3182)					\$	3,000.00		
	Bank of America (5664)					\$	14,864.61		
	Chase (7601)					\$	5,000.00		
Money Market Accounts									
	Union Bank (5251)					\$	1,916.52		
	Union Bank (8692)					\$	1,214.88		
Other Accounts									
	PayPal					\$	6,670.90		
Total Cash and Cash Equivalents								\$	32,666.91
Investments									
	Corporate Bonds					\$	82,682.42		
	Mutual Funds					\$	200,779.29		
Total Investments								\$	283,461.71
TOTAL ASSETS								\$	316,128.62
LIABILITIES									
	Liabilities					\$	0.00		
TOTAL LIABILITIES								\$	0.00
NET WORTH									
	Balance as of January 1, 2014					\$	285,087.63		
	Current Year Earning					\$	31,040.99		
	Balance as of December 31, 2014							\$	316,128.62
TOTAL LIABILITIES AND NET WORTH								\$	316,128.62

San Francisco-Peninsula Foundation

2014 Board of Directors

Bessie L. Stewart-Ross, Chair
Bettye Price, Vice Chair
Farralon Udom, Treasurer
Danielle Moore Burton, Secretary

2014 Members

Altarine Campbell-Vernon, Chapter President, SFP Alumnae
Delta Sigma Theta Sorority, Inc.
Barbara Brown, Member
Helen Kennedy Lazar, Member
Mildred Swann, Member

The Delta San Francisco-Peninsula Foundation extends its sincere appreciation to all who have donated or contributed to our mission to foster educational growth by awarding scholarships and hosting the Financial Fortitude Workshop. Special thanks to members of the Education and Scholarship Committee of the San Francisco-Peninsula Alumnae Chapter of Delta Sigma Theta Sorority, Inc., for recruiting and recommending our scholarship recipients and to the members of the Arts and Letters Committee for their collaboration in planning the Financial Fortitude Workshop.

The Delta San Francisco-Peninsula Foundation is a 501 (C) 3 non-profit organization. All donations to the Delta San Francisco-Peninsula Foundation are tax deductible.

For further information, please contact:

T: (650) 341-6671

E: dsfpfoundation@gmail.com

www.dsfpf.org

Why I Give Evelyn B. Neely



Gold Contributor

My support of the San Francisco-Peninsula Foundation has always been a personal decision. Since I had been a recipient of a grant for my high school scholastic achievement, it has been clear to me that the support needed to be continued. Participating in fundraising through the efforts of the Sorority for over 60 plus years became increasingly difficult.

The establishment of the Foundation became the avenue to continue our support to young women graduating from high school. **I firmly believe that we must encourage and financially assist in the college education of young women** for the betterment of our communities and our country.