



Annual Report

2019
2020



College Educational and Charitable Foundation

Encouraging Educational Excellence

College Educational and Charitable Foundation

Board of Trustees

William S. Giesler '68
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Brothers and Friends,

Our fiscal year ending June 30, 2020, is one for the ages. While the first half was normal, just about everything after Founders' Day was abnormal. We are not alone in what we experienced. However, I am pleased to report we have weathered the storm thus far and are quietly developing plans to be even stronger coming out of the pandemic.

During the past year, the CE&CF Board approved moving forward on two key initiatives. The first was to examine our fundraising program and develop an initiative to make the program sustainable and more successful. You have undoubtedly seen letters and surveys recently and I'll report back to you in the near future on what we learned and what we plan to do.

The second initiative was finding a replacement for OmegaFi, who provided website, fundraising and back office support to CE&CF for almost 10 years. Working with Bill Hoeb, we identified a local resource, Association Connection (AC). We entered into an agreement with AC in late spring and made the change effective July 1, 2020. They have assumed responsibility for updates to our alumni directory, providing email communications and general website and office support. We have experienced a significant increase in service and they continue to find ways to help us. Related to the change to AC, we contracted with CreateDev LLC to design and implement a new *ucpikes.org* website. Hundreds of volunteer hours were expended prior to launching on July 1 and work has continued to refine and improve it. My hat is off to Hobie for his dedication and considerable efforts in making this transition. We believe that what we have done will pay dividends for a long time to come.

Finally, CE&CF and the Pike Foundation awarded a record \$60,000 in scholarships to 35 deserving students. At the virtual Pike International Convention in August, Alpha Xi brought home their 10th consecutive Smythe Award, the Scholarship Cup for having the highest GPA across all Pike Chapters and the Alumni Relations award. At UC, their awards included IFC Overall Premier Chapter Outstanding Chapter, Overall Gold Level Chapter, Outstanding Brotherhood, Outstanding Service Event, Outstanding Chapter Event, Philanthropist of the Year and Outstanding Housing Corporation. Way to go Alpha Xi!

Sincerely,



William S. Giesler
President

Raise Invest Award

\$60,000
total
awards

35
scholarships/
awards

Financial Report

It was another year of growth and progress for the College Educational and Charitable Foundation. For the fiscal year ended June 30, 2020, the value of the CE&CF portfolio was \$1,249,727, an increase of \$100,204, and our account management fees amounted to 0.51% of the value of the portfolio. Total contributions from alumni and friends was \$147,366. We continue to be pleased with Johnson Investment Counsel and their management of the CE&CF portfolio.

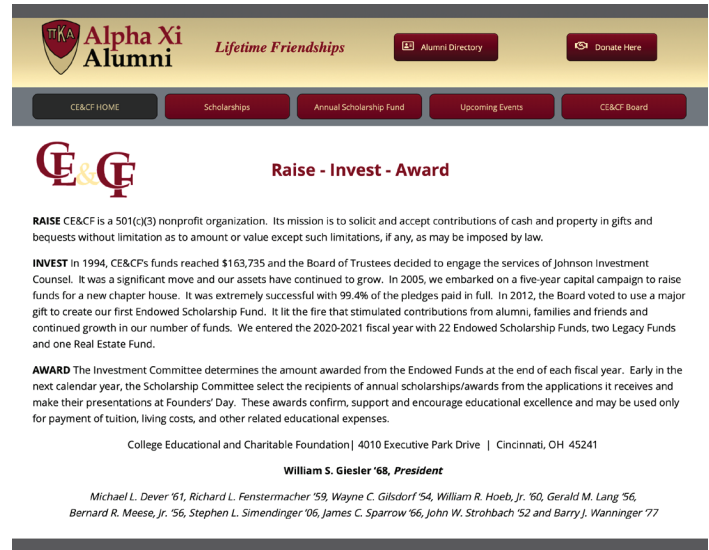
Funds Update

We added the Karen and Bill Hoeb Endowed Scholarship Fund and the William R. Nester Alpha Xi Memorial Endowed Scholarship Fund (created by Harry Sparks). We now have 22 Endowed Funds, two Legacy Funds and a Real Estate Fund. Endowed and Legacy Funds are combined with the CE&CF General Fund and are managed collectively, but each is accounted for individually.

Each year the Investment Committee determines the amount available (currently 4% of principal) for awards from our endowed funds. CE&CF provided additional support in 2019-2020 and the minimum award from each of our endowed funds was \$1,500.

Creating a Scholarship Fund

We welcome the opportunity to discuss the creation of a fund. You may begin at any amount, but it will not become an endowed fund until it reaches the required minimum amount, currently \$10,000. Additional contributions may be added in any amount at any time. To learn more, please contact our Foundation Administrator, Megan Prewitt, at info@ucpikes.org or (513) 554-3077.



New Website

On July 1, 2020, the new ucpikes.org website made its debut. Highlights of the new website include:

- ◆ Password-protected Alumni Directory
- ◆ Online donations and online reservations (for Christmas Scholarship Luncheon and Founders' Day Banquet)
- ◆ UC Bearcat Scholarship Application – offering online completion and submission
- ◆ Current list of Endowed Scholarship Funds
- ◆ Schedule of upcoming events
- ◆ Fiscal year donor honor roll
- ◆ Password-protected tab for Board Members with access to board documents
- ◆ Tabs provided for Southland Hall Association and UC Pike Housing Corporation (future development)

0.51%

account
management
fees

2.7%

increase in
portfolio
value

2019-2020 Donor Honor Roll

Diamond Society \$25,000 and above

Jane Van Fossen

Garnet & Gold Society \$10,000 – \$24,999

Karen & Bill Hoeb ♦ Don Jacob ♦ Harry Sparks

Alpha Xi Legends Society \$5,000 – \$9,999

Dick Fenstermacher ♦ Gerald Lanz ♦ Mark Stuhlfreyer

3400 Brookline Society \$2,000 – \$4,999

Bob Dorsey ♦ Farmer Family Foundation ♦ Gardner Family Foundation

Bill Giesler ♦ Nick Orphan ♦ John Strohbach ♦ Gay Volz

Founders Society \$1,000 – \$1,999

John Effmann ♦ Kent Kleeberger ♦ Dave Krutsch ♦ Gary Menchhofer & Family ♦ Gary Pies ♦ Mark Serrienne

Junior Founders Society \$500 – \$999

Gary Adams ♦ Steve Armsey ♦ Rich Dineen ♦ Bob Felts ♦ James Hadley ♦ Margaret Hardy Trust ♦ Mary Ann Jervis

Charlotte McEnery & Family ♦ Rick Paxton ♦ Bill Scheben ♦ Roger Weller ♦ Ralph & Donna Winkler

Charlie Woodward ♦ Matt & Shannon Yung

1910 Club \$250 – \$499

Nancy & David Aichholz ♦ Bob Boling ♦ Joe Burnett ♦ Dan Ferris ♦ Wayne Gilsdorf

Doug Good ♦ Jerry Lang ♦ Jim Lied ♦ Bob Markland ♦ Bernie Meese ♦ Paul Muething

Cathy & Dave Reeve ♦ Mike Ryan ♦ Roger Ryan ♦ Joyce & Gary Sallquist ♦ Bill Varga ♦ Barry Wanninger

Fire Truck Club \$100 – \$249

Brenda & Jeff Augustin ♦ Kathy & Lynn Barber ♦ Bill Bayuk ♦ Lincoln Beckner ♦ Jim Black ♦ Dick Chalfin

Bonnie Chance ♦ Ron Christiany ♦ Richard Clasby ♦ Jusie Clendening ♦ Christian Conrad ♦ Barry Cors

James Creamer ♦ Tom Cuni ♦ Chris Dalambakis ♦ Bill Dehmer ♦ Mike Dever ♦ Jerry Doerger ♦ Gina Estenfelder

Moreau Estes ♦ Alice & Bill Fienning ♦ Katie & Jim Gantz ♦ Greater Cincinnati Foundation ♦ Ryan Halvorsen

John Hampton ♦ Bill Hausfeld ♦ David Karem ♦ Dale Kelley ♦ Patrick Latham ♦ Kay Lawler ♦ Joe Lawson

Chris & Anne Lee ♦ Dick Leist ♦ Tom Liguzinski ♦ William Lykins ♦ Mary Beth Martin ♦ David McDufford

Louis Miller ♦ Starr & Bob Miller ♦ Pat & Bill Murray ♦ Kevin O'Connell ♦ Nick Partie ♦ Judy & Ken Reynolds

Jan Rife ♦ Jeri & Tom Russell ♦ Patti Rust ♦ SC Ministry Foundation ♦ Erv Schneider ♦ Bob Schreiber

Dave Shepherd ♦ Steve Simendinger ♦ Jim Sparrow ♦ Frank Stanhope ♦ Phillip Stebbins

Dan Stizlein ♦ Wayne Stratton ♦ Kay & Bill Swishhelm ♦ Garry Thompson ♦ Ruth Tudor ♦ Pam Wheatly

Elaine Wilkerson ♦ Sue & Bob Wilson ♦ John Wolfarth ♦ Jim Woodard ♦ Mark Young ♦ Gail & Larry Zix

Donor \$1 - \$99

Marcy & LaRue Bennett ♦ Randal & Peter Bloch ♦ Bill Boronkay ♦ Eugene Box ♦ Mary Anne & Tom Brennan

Ella Brown ♦ Brad Chamblin ♦ Amy & Mike Cheney ♦ Mike Consoletti ♦ Steve Crone ♦ Ron Goodfellow

Lisa Griffith ♦ Eric Haines ♦ Bob Jones ♦ Yvette & Dorsey Jones ♦ Marianne & Don Klekamp ♦ Barb Koch

Rich Linnemann ♦ James Marsch ♦ Mary McEnery ♦ Martha Morrison ♦ Jean Morrison ♦ Jody Mullen

Michael & Mary Sue O'Donnell ♦ Sherri & Tom Orr ♦ June & Pete Ostmann ♦ Mark Picket ♦ Tari & Brian Quinlan

Gerri & Jack Rosati ♦ Kathy & Rick Schmadel ♦ Germaine Spencer ♦ Carol & Bob Stegeman ♦ Amy Straus

Rebecca Suder ♦ Patti & Jack Sutter ♦ Tom Thaman ♦ Sue & Bob Wessinger

College Educational and Charitable Foundation
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CE&CF is a 501(c)(3) non-profit organization