



On behalf of Tri Delta's Foundation Board of Trustees, thank you for the incredible impact you've made on Tri Delta during the 2024-25 fiscal year.

Thanks to your generosity, Tri Delta's Foundation provided more than \$2.7 million in emergency financial assistance, academic scholarships and funding for leadership and educational programs. Your support provides a lifeline for Tri Deltas at every stage of life while also preparing the organization to continue meeting the needs of our members for generations to come.

Tri Delta's Crescent Fund is a crucial support system for sisters navigating unexpected challenges, providing a safety net during critical moments like medical emergencies, job losses and other significant life events. Over the past year, we extended grants of more than \$190,500 to assist 36 members. One Alumnae Crescent Fund recipient shared the following:

"This assistance means more to me than I can express. It has provided me not only with financial relief but also a deepened sense of connection and support from our sisterhood."

Tri Delta's Foundation proudly presented \$672,300 in both need- and merit-based scholarships to 223 outstanding undergraduate and graduate members pursuing diverse majors, ranging from computer science to business to social justice to engineering. These scholarships play a vital role for many members, alleviating the need for student loans and part-time or full-time jobs to pay their educational expenses. Scholarship recipient Michelle Arellanes, *Southern California*, wrote the following:

"This scholarship allows me to fully commit to my studies and take advantage of academic and professional opportunities without the burden of financial stress. Your generosity inspires me to keep working hard and reminds me of the importance of lifting others as I climb."

Tri Delta's Foundation also allocated more than \$872,200 to bolster Tri Delta's educational and leadership programs, designed to foster continuous growth and development for all members. This support benefits our collegiate sisters through programs that facilitate leadership development, mental health, healthy body image, campus safety awareness and more. One 2025 attendee of our annual Collegiate Leadership Conference (CLC) reflected on her experience:

"Attending CLC was an incredibly enriching experience that helped me grow both as a leader and as a sister. I gained valuable insights into effective communication, collaboration and personal growth that I'm eager to bring back to my chapter. When I return, I plan to implement these new strategies to encourage positivity, foster stronger connections and inspire my sisters to step into leadership roles. I'm excited to share what I've learned and help our chapter continue to thrive."

The 2024-25 Annual Report reflects the impact of your steadfast support of Tri Delta's Foundation and your ongoing meaningful investment in the lives of our members. Your generosity shapes their individual journeys and the collective future of Tri Delta. Thank you for the enduring impact you continue to make on our sisterhood.

Loyally,

Dr. Diane Petersen, *Ohio Wesleyan*, Chair
April Mathis Voris, *Alabama*, Vice-Chair
Susanne Wasson, *Oklahoma State*, Treasurer



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Tri Delta's Foundation

2024-25 Annual

Financial Summary

Tri Delta Foundation's assets under management delivered solid results in 2025. These outcomes reflect disciplined asset management by our professional advisors, active oversight by the Enterprise Finance Committee, and thoughtful stewardship by the Foundation Board of Trustees.

In close partnership with staff and advisors, the Enterprise Finance Committee reviews portfolio performance on a regular basis with a clear objective: generating sustainable, long-term returns that support the Foundation's mission of serving our members in perpetuity, while maintaining strong financial discipline and accountability.

For 2025, the Foundation's investment portfolio achieved a 7.16% net-of-fees return, modestly exceeding the long-term target of 7.0%. The portfolio's five-year annualized return of 6.49% reflects a balanced approach focused on long-term growth and capital preservation. Operationally, the Foundation continues to demonstrate sound stewardship, with a program ratio of 67% and a fundraising ratio of 13%. In addition, the Foundation has \$3,940,307 in contributions receivable, providing meaningful visibility into future funding and program support.



STATEMENT OF OPERATIONS

FISCAL YEAR ENDED JULY 31, 2025

Revenue, Gains and Other Support 2025	
Contributions - Unrestricted	\$517,408
Contributions - Scholarships & Grants	\$6,475,910
Contributions - Housing Campaigns	\$481,376
Investment Income	\$1,704,053
TOTAL REVENUE, GAINS AND OTHER SUPPORT	\$9,178,747
Expenses	
Program - Scholarships & Grants	\$3,045,582
Fundraising	\$963,011
General & Administrative	\$511,268
TOTAL EXPENSES	\$4,519,861
CHANGE IN NET ASSETS	\$4,658,886
Net Assets at Beginning of Year	\$24,480,842
Net Assets at End of Year	\$29,139,728
Contributions Receivable	\$3,940,307
Program Ratio	67%
Fundraising Ratio	13%

INVESTMENT PORTFOLIO VALUE AS OF JULY 31, 2025

\$23,743,232

Asset Allocation

Cash and Money Market	1%
Fixed Income	35%
Equities	59%
Mutual Funds	5%
Other Assets	0%
Total	100%

INVESTMENT PORTFOLIO GROWTH \$ IN THOUSANDS

2021	\$21,989
2022	\$20,911
2023	\$22,233
2024	\$23,112
2025	\$23,743