



2021 Annual Report

"Service To Others Is The Rent You Pay For Your Room Here On Earth." -Muhammad Ali

YOU CAN MAKE A **CHANGE**
IN THE LIFE
OF ONE CHILD **TODAY**



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Bernie L. Bates Foundation, Inc.

P.O. Box 150653 Alexandria, Virginia 22315-0653



Dear Friends of the Bernie L. Bates Foundation, Inc.:

The year 2021 proved to be one steeped in challenges and rich in rewards. This copy of the Bernie L. Bates Foundation, Inc. (BLB) 2021 Annual Report summarizes the highlights from Fiscal Year 2021. The Foundation, in partnership with the Psi Alpha Alpha Chapter of the Omega Psi Phi Fraternity, Incorporated has continued its core mission of funding for the future. This is accomplished through the granting of educational scholarships, other types of financial aid to worthy individuals, both undergraduate and graduate, and the provision of assistance to community groups and individuals in other civic improvement and charitable activities. The Foundation continues to accept and make donations of money for educational and charitable purposes to support the accomplishment of the non-profit purposes of the corporation. The principal focus being the promotion of the general welfare for all by providing, from time-to-time, services to the community to encourage the development of its people, physical assets, and its institutions.

This Report covers the genesis and history of the Foundation, appropriate financial data, current services provided, programmatic efforts underway, its structure, and the organization's short term and long-term goals. Also, the organization's, mission, and guiding principles is described relative to its core functions. Most importantly, this report will give the reader the clearest picture of current state of the organization and the projected future.

Also enclosed are the 2021 financial statement and the proposed budget for FY 2022. This information will be helpful to assess the effectiveness and responsibilities involved within the organization. As always, we need more volunteers and active board members. As you read the report, think of areas where you might want to become involved. We have many areas that need more attention and time. On behalf of all BLB board members - thank you for your support. Your assistance, lending hand and positive comments continue to be the fuel that helps the Foundation to keep moving forward.

Sincerely yours,

A handwritten signature in cursive script, reading 'Richard G. Morris'.

Richard G. Morris, President
Bernie L. Bates Foundation, Inc.

Bernie L. Bates, the Name



Bernie Leroy Bates was born April 8, 1944 in Ashville, N.C. to Ms. Ivy Bates. He was raised in High Point, N.C. by his maternal grandparents, Joe Parker and Idell Tussey.

Brother Bates credited his grandparents with instilling in him the value of academic excellence and to living a purposeful life. In 1971, he married Patricia Belton. From that marriage, two sons were born: Bernie, Jr., and Belton Parker. Bernie Bates was initiated into the Omega Psi Phi Fraternity, Inc. on April 6, 1963 through Alpha Chapter, Howard University.

Brother Bates enlisted in the United States Army on May 18, 1965. He was commissioned a Second Lieutenant upon completion of Infantry Officer Candidate School in 1967 and was immediately detailed to service in the Military Intelligence Branch. In 1972, he graduated from Howard University, Washington, D.C. with a degree in Political Science. While at Howard University and after graduation, he remained extremely active in the fraternity, participating in Scholarship fundraisers for needy kids and supporting other scholarly activities on their behalf. He received his Law degree from George Washington University, Washington, D.C. in 1975 and transferred to the Judge Advocate General's Corps, United States Army in 1976. He was admitted to the Bar of the District of Columbia and maintained membership in the National Bar Association and the American Bar Association.

As a career military officer, Brother Bates attained the rank of Lieutenant Colonel. His military assignments included: The Defense Language Institute of Monterey, California where he studied Mandarin Chinese and combat in the Republic of South Vietnam. He also served at Fort Meade, Fort Holabird, Fort Bragg and in the Republic of Germany and the Military District of Washington. Lieutenant Colonel Bates earned military awards and decorations which included: The Bronze Star Medal, The Meritorious Service Medal, the Army Commendation Medal, the National Defense Service Medal, The Vietnam Service Medal, the Vietnam Campaign Medal, the Vietnam Cross of Gallantry with Palm, the Parachutist Badge, the Army Service Ribbon, and the Overseas Ribbon. Bernie L. Bates, loving Husband, Father, Son, Brother, and family member; as well as esteemed Brother of Omega Psi Phi Fraternity, Inc. died suddenly on August 27, 1984 at Fort McNair, Washington, D.C.



The Organization



The Bernie L. Bates Foundation, Inc. is a 501(c)(3) organization that provides scholarships to college-bound students, high school seniors and funding for other critical social needs in the Fairfax County community. Bernie L. Bates Foundation, Inc. also participates in the annual **Combined Federal Campaign (CFC)** through campaign number ID 58697.

We invite you to peruse our website (www.blbinc.org) and that of our partner the Psi Alpha Alpha Chapter of the Omega Psi Phi Fraternity, Inc., <https://fairfaxcountyques.org/> to see our united involvement with youth mentorship, community service, scholarship opportunities and other community-related activities. If you need support in areas that we have not identified, wish to donate, or have a general inquiry please complete the Foundation's web-based contact form.

The purpose of the Foundation is to help build and give back to our community. We are convinced that through our combined efforts we can yield funding for scholarships to deserving students, facilitate support for senior citizen programs, and engender sharing with and for those in need of a helping hand. Your patronage, your support, your contributions—all makes it possible to gain and maintain effective outreach and community-based programming. We look forward to working with you—God Bless.

Without exception and in concert with the Psi Alpha Alpha Chapter, the Foundation has been able to conduct direct and comprehensive engagements that target improvements in the quality of Fairfax community life. Because of such collaborative efforts of talent and manpower the chapter and Foundation have together awarded over \$507,000 to date.



Vision, Mission and Goals



Our Vision:

As the year 2021 ends there remains much to be accomplished. As a Foundation we will remain steadfast in our determination to provide ever enhanced assistance to those in the greatest need in our community.

Our Mission:

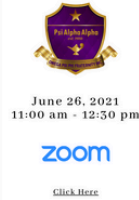
The Bernie L. Bates Foundation, Inc. shall:

- Award scholarships to college students and college-bound high school students.
- Provide support to the less fortunate by assisting to feed, clothe, house, and educate them.
- Support food banks, shelters, and other helping facilities in the community.
- Assist in community educational activities such as talent enrichment and college preparation programs.
- Seek out opportunities to support and mentor the youth in our community.
- Provide leadership training opportunities for upcoming and well-established professionals in our community.

Our Goal:

- Solidify effective marketing and branding materials.
- Expand further the impact of the revenue generating potential of both the Combined Federal Campaign and "Smile.Amazon" on the Foundation's financial statement.
- Continue to identify and engage funders offering grant making opportunities consistent with the mission and vision of the Foundation.
- Continue to foster mutually supportive relationships with the Central Fairfax and Northern VA Black Chambers of Commerce.
- Increase Foundation assets by no less than 5%.
- Add ten new participants to the Foundation's Million Dollar Challenge program in 2022.
- Continue to offer relevant professional training topics such as the well-received "The Discipline of Now" series offered to Board members and others in 2021.

2021 Virtual Scholarship Awards Ceremony
Education...The Best Way to Succeed
"Recognizing Student Excellence...Investing in our Future Leaders"



OMEGA PSI PHI
FRATERNITY, INC.

Donate Now! Text blbscholar to 41444

Bernie L. Bates Foundation, Inc.
President's Report
December 31, 2021

"None of us, including me, ever do great things. But we can all do small things, with great love, and together we can do something wonderful." – Mother Teresa

Directors, as I reflect on the past year, I am quick to recognize the impact of COVID-19 and the resulting pandemic on our Foundation, community, and nation at large.

We began the year with reservation as even then the Foundation found itself in the grips of an unrelenting virus that wreaked havoc on our community and that which we had come to take for granted.

The setting of measurable goals; the creation of marketing materials; and the setting of a social media strategy all took a back seat to the urgent needs of first responders, medical personnel and those who stood on the firing line wrought with the sick and dying. It was into this breach that the Foundation found itself in unselfish partnership with the leadership and chapter members of the Psi Alpha Alpha chapter of the Omega Psi Phi Fraternity, Inc. among a host of others.

As a Foundation, we further wedged our footprint into our community's social fabric. As the year ends, the Foundation's inventory of priorities and accomplishments includes in the following:

- In 2021 the Foundation initiated and expects to see the inaugural occurrence of its Community Recognition/Privilege Award event in early 2022.
- The value of the partnership and communications between the Foundation and George Mason University (GMU) was evident through the Foundation's endowment at GMU, a recent article in a GMU publication and the invitation for the Foundation to sit on the College of Science Dean's Advisory Board; a Board of community leaders with intersection interests with the College, charged with advising the College leadership on enhancing visibility and resources.
- 2021 saw a renewed emphasis and push in participation by Foundation supporters via Smile.Amazon, an effort that can be expected to continue in the coming years.
- Purposeful branding activities continued that sought to incorporate the Foundation's image, its presence within the community, its Million Dollar Challenge initiative ("Be One in a Hundred") its promotion of Smile.Amazon (Make BLB Smile!) and its Combined Federal Campaign efforts.

- Together with the Psi Alpha Alpha chapter the Foundation was able to donate funds sufficient to support the drilling of a clean water borehole in the township of Akwamufie East, just outside the capital of Accra, Ghana.
- The Foundation maintained its Dishonesty Bond, Directors and Officers Insurance, event insurance, and other measures that serve to protect the Foundation's assets.
- In 2021 the Foundation became fully engaged with the Central Fairfax and Northern VA Black Chambers of Commerce and in 2022 expects to find avenues of similarity that can be supported by all parties.
- 2021 also occasioned the opportunity for the Foundation to provide support for a BLB Art Gallery hosting a local artist as well as professional development training via a sponsored webinar series entitled "The Discipline of Now".
- Challenged by the elements and postponements the Foundation was nonetheless able to successfully sponsor the 2021 BLB Memorial Golf Classic.
- In 2021 the Foundation's website was used to spotlight those remarkable individuals who have contributed much to the local community.
- The MobileCause platform has proven to be an invaluable component in the Foundation's efforts to streamline on-line donations, collections reporting and financial management.
- In 2021 Youth Aviation and the Young Airmen Association out of New York City continued to be a point desired engagement that offers promising outcomes for those the Foundation hopes to serve.
- Given past performance and future projections, increasing Foundation assets by no less than 5% continues to be reasonable expectation.
- The Foundation expects to add 10 new participants to its Million Dollar Challenge program in 2022.
- The Foundation will conduct several hands-on-training topics for Board members in 2021.

I would be remiss to not make honorable mention of the hard work and dedication of Director Hector Sheppard in the organization and execution of 2021's virtual BLB Scholarship and Recognition Awards event. Such out of the box thinking paved the way for other examples of applied tenacity that resulted in above average results. In virtually every case the Foundation's success was predicated on the unselfish commitment of the chapter's leadership and supporting chapter members. Because of such partnerships, BLB's visibility proved quite apparent through activities such as the BLB Memorial Scholarship, Talent Hunt, Stuff the Bus, and Achievement Week Programs.

The Foundation has remained consistent in its support for youth aging out of foster care and the Foundation's Reading for Success program. Both efforts offer great promise as we witness the growing gratification shared with members of the board among youth and staff alike.

2021 also bought with it another the year of COVID-19, and with that came the challenge to rise to the occasion in both giving to and support for the Fairfax community. Once gain, in partnership with Psi Alpha Alpha, the Foundation was able to find a way to target meaningful resources to first responders and others.

The promise in 2022 looks bright as we continue to solidify and make progress in the Foundation's branding efforts through the creation of effective marketing materials, the evolution of the Foundation's signature "Privilege Award" event, the 's use of virtual technology, and the formulation of measurable goals that showcase Foundation results.

Everybody can be great because anybody can serve. You don't have to have a college degree to serve. You don't have to make your subject and verb agree to serve. You only need a heart full of grace. A soul generated by love.

--Dr. Martin L. King, Jr.

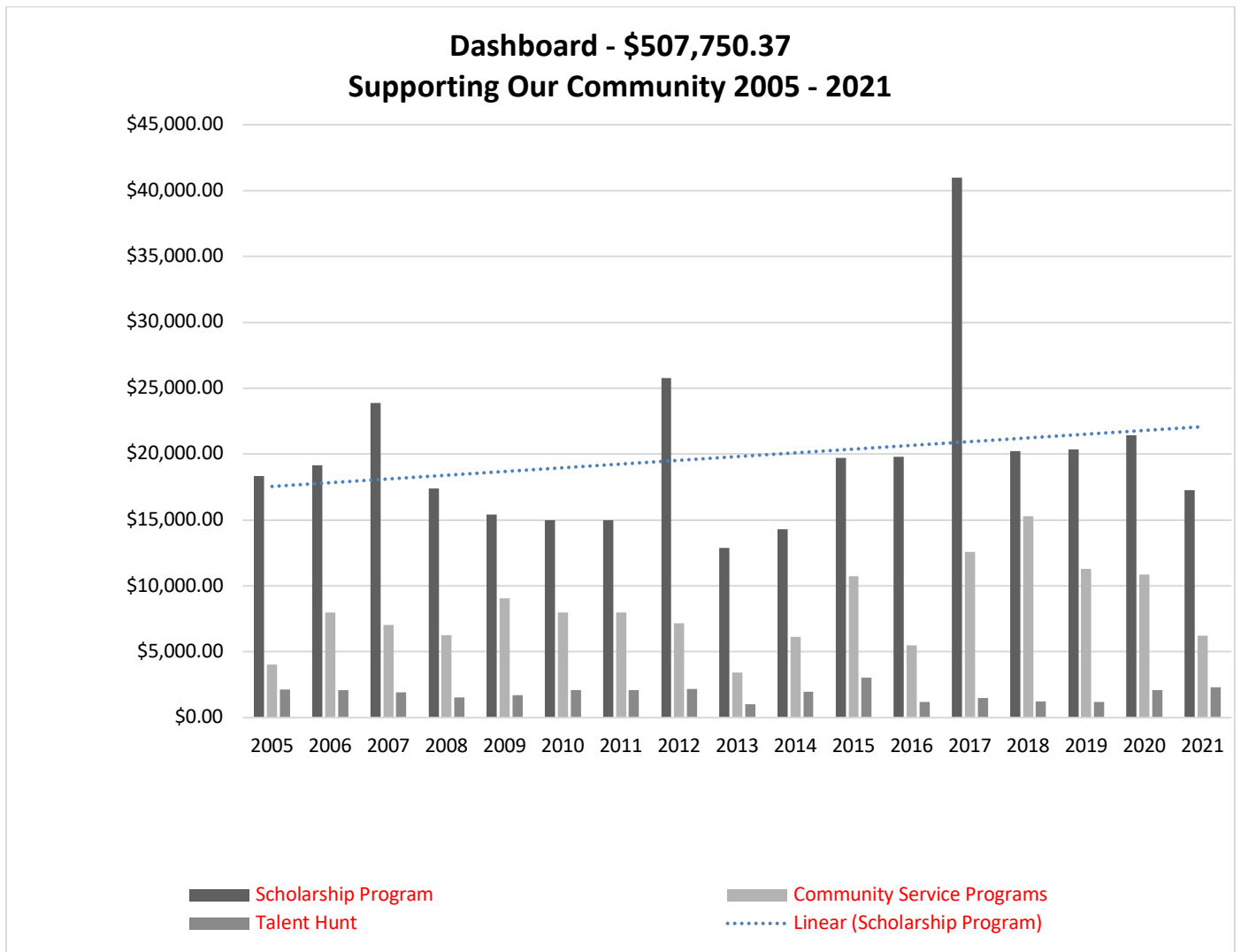
Humbly submitted,



Richard G. Morris, President
Bernie L. Bates Foundation, Inc.



Financial Snapshot



Statement of Financial Position

December 31, 2021



Assets		
	Cash & Cash Equivalents	\$ 55,926
	Notes Receivable	\$ 42,500
	Investments	\$377,796
Total Assets		\$476,222
Liabilities		
	Scholarships Payable	\$ 14,470
	Notes Payable	\$ 93,000
Total Liabilities		\$107,470
Net Assets (Foundation Equity)		
	Temp Restricted Net Assets	\$ 43,000
	Unrestricted Net Assets	\$325,752
Total Net Assets		\$368,752
Total Liabilities & Net Assets		\$476,222

2022-Proposed Budget



<u>Income :</u>		<u>Budget</u>
100000	CFC	1,600
110000	AmazonSmile Foundation	150
150000	Psi Alpha Alpha Programs	87,145
151000	Social Action	
152000	MANUP Mentoring Donations	2,500
151400	Sponsorship and Marketing	500
152000	Talent Hunt	2,300
153000	NCAA Raffle	
	Tickets 2022 (via MobileCause)	2,345
	Sponsors 2022	15,500
154000	Golf Tournament	
	Golfers	13,500
	Sponsors	16,500
155000	Achievement Week	
155100	Ads/Banquet	6,500
155200	Sponsors/Contributors	1,000
156000	Fundraising (Virtual Event/Sponsors/Raffle)	4,500
156100	New Year's Eve Ball Tickets	22,000
157000	Celebrate Fairfax	500
160000	Other Income	15,800
161000	Million Dollar Challenge	2,500
	Donations (various):	
162000	Investments	7,800
163000	Donations - Other Income	3,500
164000	Student Awards	100
165000	I Believe I Can Fly	1,000
167000	BLB Founder's Day Campaign	150
168000	BLB Giving Tuesday Campaign	250
169000	BLB Web Series/Discipline of Now	500
170000	Endowment (George Mason Univ)	
171000	Psi Alpha Alpha	500
190000	Privilege Award	3,375
	Contributions	1,875
	Sponsorships	1,500
	Total Income	109,070

Expenses:

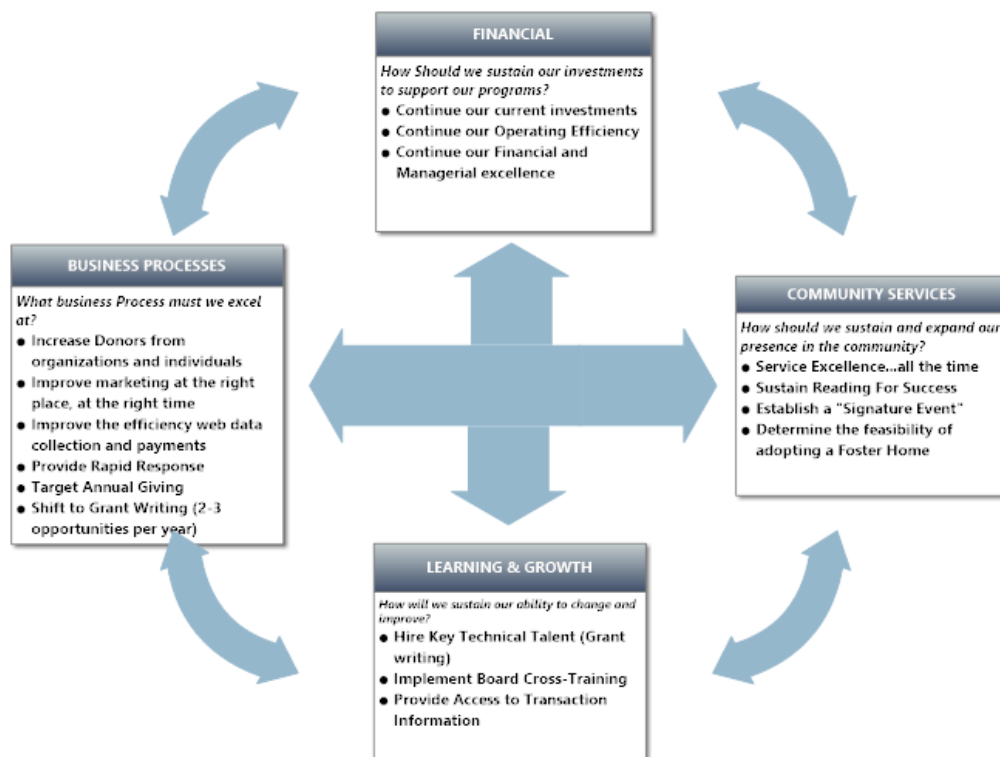
500000	PAA Scholarships/Programs	67,550
510000	Scholarships	17,500
520000	Social Action	
523000	I Believe I Can Fly	2,000
526000	Boreholes in Ghana	2,000
530000	Talent Hunt	2,300
540000	Achievement Week	
541000	Psi Alpha Alpha Booklet	6,500
542000	BLB Sponsorship	750
550000	Golf Tournament	12,500
	Psi Alpha Alpha	
560000	Fundraising (Virtual Event/Sponsors/Raffle)	2,000
561000	New Year's Eve Event	22,000
600000	Bernie Bates Scholarships	3,400
601000	CFC Expenses	400
602000	Bill Dickey Scholarship Association	500
603000	Scholarships	2,500
610000	Community Recognition	1,800
611000	Students	
620000	Student Awards Breakfast	5,000
630000	Fairfax County Foster Care	500
640000	Reading For Success	800
650000	MANUP Mentoring	2,500
660000	National Museum of African American History and Culture	500
670000	Investments	5,000
680000	Omega Charities	1,000
681000	Youth Academy Program	500
682000	Third District Foundation	500
690000	Administrative Fees	2,000
700000	Information Technology (IT)	6,188
	Software and Development (MobileCause)	3,688
	Service Charges	1,500
	Website Maintenance	1,000
710000	Sponsorship and Marketing	750
711000	Public Relations (BLB Web Series)	500
712000	Third District	250
720000	Contingency (President Discretionary)	500
730000	Endowment (George Mason Univ)	1,000
740000	Meetings and Storage	1,300
750000	Privilege Award	9,282
	Venue Expenses	4,857
	Other Expenses	4,425
	Total Expenses	109,070

Governing Documents



- ❖ **By-Laws and Articles of Incorporation**
 - ❖ **Policies and Procedures Manual**
 - ❖ **Internal Revenue Code (501 (c) (3))**
 - ❖ **Statement of Conflict of Interest**
- ❖ **Commonwealth of Virginia Incorporation**
 - ❖ **General Liability – State Farm**
- ❖ **Director Bonding Liability – JT McKinnon Financial Services**

The duties of the various bodies within the Bernie L. Bates Foundation, Inc. (BLB) are determined by the laws of the State of Virginia and by the organization governance policy and Bylaws. This organization governance policy is decided by the Board of Directors (Board). The Board and its Executive Committee are responsible for the management of the Organization. BLB prepares annual and interim financial statements according to general accounting principles. To-date the Board has identified an independent auditor who on an annual basis conducts any required audit. To the maximum extent possible, organization actions and records are taken and recorded appropriately. The decision-making body with responsibility for managing the Foundation are the Board of Director and its designees. The operations of the Foundation are coordinated through the president of the board in consultation with the board's executive Committee. Day-to-day operational responsibility rests within each project area and assigned volunteer members with related tasks.



Adapted from the Balanced Scorecard by Robert S. Kaplan and Dave P. Norton. Harvard Business School Press, 1996.

Accountability and Control



1. The President has overall responsibility for the operations of the Executive Committee.
2. All financial books and records are kept in a manner consistent with Generally Accepted Accounting Principles.
3. All financial books and records are open for public inspection upon request.
4. An annual report is prepared within three months after the close of each fiscal year. This report will account for the current financial status of the Foundation and describe all material progress made with the projects of the Foundation.

A copy of the annual report is sent automatically to each major donor (specifically those individuals participating in the Foundation's Million Dollar Challenge program) and to all other donors upon specific request. The annual report is also made available to the public on the Internet, or as may otherwise be requested during normal business hours upon request. The Internet version may be freely downloaded. A non-donor may also have a hard copy of the annual report furnished to him by mail, at cost, upon request.

2021 – A Year of Challenges, a Year of Opportunities

Donated borehole, township of Akwamufie East, outside the capital of Accra, Ghana.



Board of Directors



2021 witnessed the loss of Foundation Director Emeritus Marion L. "Barney" Barnwell, a pillar in the Fairfax County community and a guiding light, mentor, and counselor to those who were privileged to sit at his table.



The Board under the Foundation Bylaws and principles manage BLB. According to the Foundation articles of incorporation, the Board currently consists of 17 members appointed by vote or by position within the partnering organization. All directors are required to be active with a hands-on approach with the Foundation's activities and to disclose circumstances that might be perceived as a conflict of interest.

- The Board supervises the operation and management of BLB and decides on significant matters relating to strategy, investments, organization, and finance.
- The Board is responsible for overseeing management and for the proper organization operations. It is likewise responsible for overseeing the proper supervision of accounting and control of financial matters.
- The Board has defined a working order, the principles of which are published in the annual report and on the organization's website.
- The Board elects a President and a Vice President from among the Board members.
- The Board approves the organizational structure.
- The Board evaluates its performance annually.
- The Board also reviews the By-Laws annually and amends it when required.
- The Board meets regularly monthly at least ten times a year.



"Remarks & Acknowledgements"



"On Our Commitment..."
Focusing on Student Efforts and Achievements...
Appreciating Youth Talent and Creativity...
Promoting the Humanities...

President of Bernie L. Bates Foundation, Inc.
Basileus of Psi Alpha Alpha Chapter
Third District Representative of Omega Psi Phi Fraternity, Inc.

Director Richard G. Morris
Brother Willie J. Williams, Jr.
Brother Conrado B. Morgan



President
Richard G. Morris



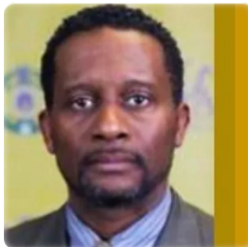
Vice President
Jerome W. Haggins, I



Secretary
Kenneth M. Younger



Treasurer
Jeffrey L. Owens



Assistant Secretary
Hector Sheppard, Jr



Kevin Williams
Director



Director
Bradford M. Caldwell



Director
George Davis



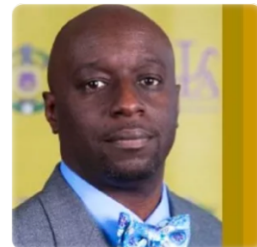
Director
Kerry Bell



Director
W.J. Williams, Jr



Director
Norris C. Middleton



Director
Marvin Chisolm



Director
Myron McDaniels



Director
Ray Buckner



Immediate Past President
Mario T. Powell