

## 2022 Annual Report

**"Then Perseverance; we want men who will realize that they have a responsibility to stand by any project that they may begin and see it through."**

*-Bishop Edgar Amos Love*

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.***, thank you for joining us as we share with you the Bernie L. Bates Foundation, Inc. (BLB) 2022 Annual Report. As the foundation comes to the close of another successful year, I am reminded of novelist John Irving’s words, “You only grow by coming to the end of something and by beginning something else.”

The year 2022 offered the foundation both opportunities and successes. Without exception, 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. The Foundation continues an investment strategy that is based on goals, risk tolerance and the future needs for capital funding. As always, the principal focus is 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.

Based on such financial stewardship the foundation, in concert with the chapter, has been able to continue its 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.

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 the current state of the organization and its projected future.

Also enclosed are the 2022 financial statement and the proposed budget for FY 2023. This information will be helpful in assessing the effectiveness and responsibilities involved within the organization. As always, the foundation needs 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 that reads '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](http://www.blbinc.org)) and the website of our partner, the Psi Alpha Alpha Chapter of the Omega Psi Phi Fraternity, Inc., <https://fairfaxcountyques.org/>. You will 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** in scholarships and community support to date.



**campaign number ID 58697**

# Vision, Mission, and Goals



## **Our Vision:**

As the year 2022 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:

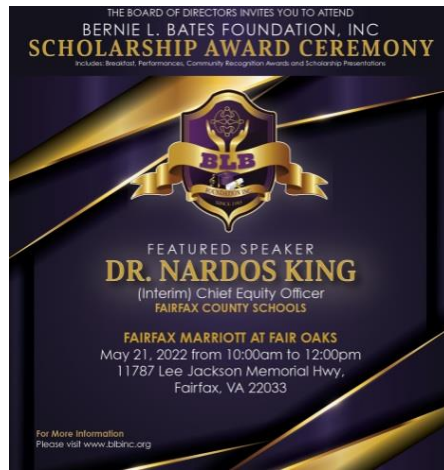
- Award scholarships to college students and college-bound high school students.
- Provide support to the less fortunate by assisting to feed, clothe, house, and educate them.
- Support food banks, shelters, and other helping facilities in the community.
- Assist in community educational activities such 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 2023.
- Continue to offer relevant professional training topics such as the well-received “The Discipline of Now” series offered to Board members and others in 2022.







***Bernie L. Bates Foundation, Inc.  
President's Report  
December 31, 2022***

Directors, the end of any season or in this case, year, offers all an opportunity for reflection and consideration. It is also a time for the renewal of hope and aspiration as once again we set course and sail into our tomorrows. Now, almost two years into the Covid-19 pandemic, an end might finally be in sight. Experts say that Covid will likely have lost its “pandemic” status sometime in 2022, due largely to rising global vaccination rates and developments of antiviral Covid pills that could become more widespread next year. Instead, the virus will likely become “endemic,” eventually fading in severity and folding into the backdrop of regular, everyday life.

Regardless we will need to take care to not let our guard down too hastily. The needs of our first responders and front-line workers unfortunately remain intact as we witness a whirlwind of catastrophic and climatically driven events that occurred in 2022. In customary fashion the Foundation in unselfish partnership with the leadership and chapter members of the Psi Alpha Alpha chapter of the Omega Psi Phi Fraternity, Inc. joined resources and hands in the delivery of support and services to those most in need.

As in years past a retrospective look as the Foundation plots its way forward provides an inventory of priorities and accomplishments such as the following:

- Early In 2022 the Foundation introduced to the Fairfax County community its inaugural Privilege Award and Community Recognition event; an award representing the highest form of recognition bestowed by the Board of Directors. An occasion acclaimed a considerable success by the community and the Foundation’s partners.
- The Foundation’s partnership with George Mason University (GMU) continues both through the Foundation and chapter’s’ endowment at GMU and the opportunity to sit at the table with others as part of the College of Science Dean’s Advisory Board, a Board of community, business, and academic leaders with intersecting interests with the College.
- 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.
- The Foundation maintained its Dishonesty Bond, Directors and Officers Insurance, event insurance, and other measures that served to protect the Foundation’s assets.
- In 2022 the Foundation remained engaged and with the hope of advancement in the affairs and interest of the Central Fairfax and Northern VA Black Chambers of Commerce.
- The Foundation was able to conclude its self-sponsored professional development training series entitled “The Discipline of Now”.

- With an army of support provided by Psi Alpha Alpha the Foundation was able to successfully sponsor it's 2022 BLB Memorial Scholarship Golf Classic.
- With an eye toward enhancement in 2022 the Foundation continued to use its website in the promotion of activities, accomplishments, and events.
- The now well-entrenched MobileCause platform continued to be an invaluable component in modernizing both the Foundation and the chapter's efforts to streamline on-line donations, collections reporting and financial management with forward facing sophistication.
- As an annual program the Privilege Award and Community Recognition event will again be hosted at George Mason University's Center for the Arts in early spring 2023.
- In 2023 the Foundation looks forward to reenergizing its "I Believe I Can Fly" program in partnership with the Youth Aviation and the Young Airmen Association out of New York City.
- The Foundation expects to add 10 new participants to its Million Dollar Challenge program in 2023.
- In 2023 it is hopeful that the board will see fit to establish a Foundation Advisory Board. As experts in their field an independent Advisory Board brings knowledge, critical thinking and analysis that will help to shape and share the story and message of the Foundation, its works, and its vision.
- In 2023 the board should consider the identification of a Board of Directors evaluation process. Doing such represents a critical opportunity to enhance multiple dimensions of board effectiveness while also strengthening governance practices.

Despite present economic strains and recession risks current Foundation strategies for protecting Foundation investments against inflation and other economic contractions have proven to be both reliable and noteworthy. The Foundation has benefited mightily from the very deliberate and insightful work of Vice President Jerome "Duke" Haggins, Treasurer Jeff Owens and the rest of the financial management team. That said, given past performance and future projections, increasing Foundation assets by no less than 5% continues to be a reasonable expectation.

Once again Director Hector Sheppard led the way in in the execution of 2022's BLB Scholarship and Recognition Awards Ceremony. As has been said before in virtually every case the Foundation's success has been 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, Backpack-Giveaways and Achievement Week Programs.

During the Privilege Award program Secretary Kenneth Younger received the Fort Belvoir Christian Education Award for his work and dedication to that ministry. As is my prerogative I too wish to acknowledge Director Younger for the incredible time and effort he has put forward to both keep the Foundation running like a well-oiled machine while equally serving in stellar fashion in the facilitation of any number of successful events throughout the year.

Once again, the Foundation joined forces with Psi Alpha Alpha in its support for foster care youth graduating from High School and college along with 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.

The promise in 2023 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 use of virtual technology, and the formulation of measurable goals that showcase Foundation results.

From the President's seat the Foundation's future continues to look both promising and bright.

Respectfully submitted,



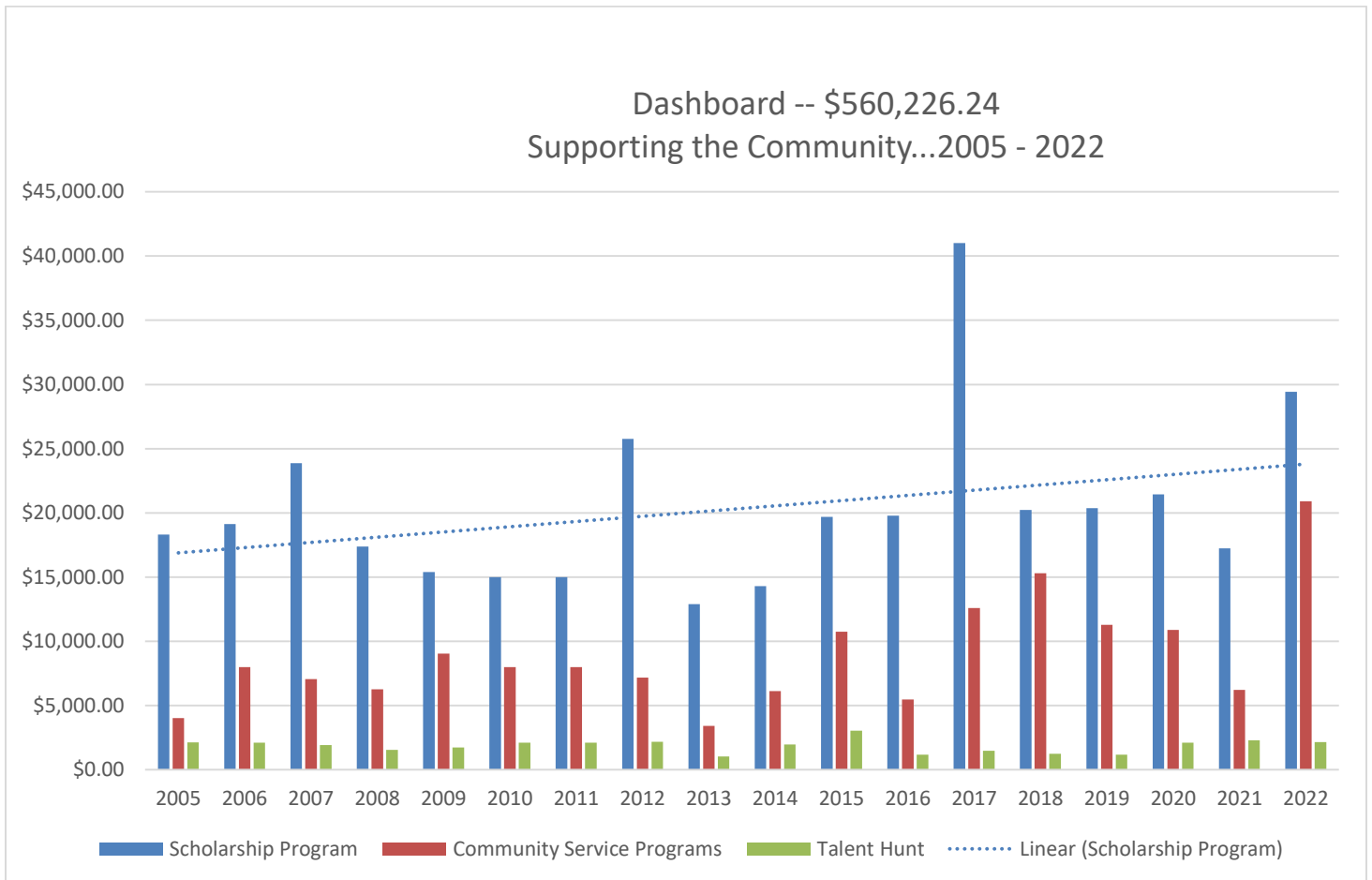
Richard G. Morris, President  
Bernie L. Bates Foundation, Inc.





## Financial Snapshot

*To paraphrase BLB doesn't always wait to learn from their own mistakes.  
 we choose to learn from the mistakes of others and avoid trouble.*



# ***Statement of Financial Position***

## ***December 31, 2022***



Assets	
Cash & Cash Equivalents	\$ 45,560.90
Notes Receivable	\$ 59,546.50
Investments	\$ 319,269.50
Total Assets	\$ 424,376.82
Liabilities	
Scholarships Payable	\$ 10,500.00
Notes Payable	\$ 137,000.00
Total Liabilities	\$ 140,500.00
Net Assets (Foundation Equity)	
Temp Restricted Net Assets	\$ 70,453.50
Unrestricted Net Assets	\$ 213,423.32
Total Net Assets	\$ 283,876.82
Total Liabilities & Net Assets	\$ 424,376.82

*"A budget is more than just a series of numbers on a page; it is an embodiment of our values."*

– Barack Obama

# 2023-Proposed Budget



<u>Income :</u>		<b>Proposed Operating Budget</b>
<b>100000</b>	<b>CFC</b>	<b>1,900</b>
<b>110000</b>	<b>AmazonSmile Foundation</b>	<b>150</b>
<b>150000</b>	<b>Psi Alpha Alpha Programs</b>	<b>102,700</b>
151000	Social Action	
152000	MANUP Mentoring Donations	6,000
151400	Sponsorship and Marketing	500
152000	Talent Hunt	2,200
153000	NCAA/Super Bowl Raffle	
	Tickets (via MobileCause)	2,000
	Sponsors NCAA	7,000
	Super Bowl Raffle	6,000
154000	Golf Tournament	
	Golfers	14,000
	Sponsors	15,000
155000	Achievement Week	
155100	Ads/Sponsors	9,000
155200	Banquet	9,000
156000	Fundraising (Sponsors/Raffles)	5,000
156100	New Year's Eve Ball Tickets	27,000

**157000 Celebrate Fairfax** **250**

**160000 Other Income** **19,738**

161000	Million Dollar Challenge	7,500
	Donations (various):	
162000	Investments	5,000
163000	Donations - Other Income	3,500
164000	Student Awards (incl BLB Scholarship Breakfast)	1,000
165000	I Believe I Can Fly	1,000
167000	BLB Founder's Day Campaign	150
168000	BLB Giving Tuesday Campaign	250
169000	Social Action/BLB Web Series	1,338

**170000 Endowment (George Mason Univ)**

171000	Psi Alpha Alpha	<b>500</b>
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**190000 Privilege Award** **3,000**

	Contributions	1,500
	Sponsorships	1,500

**Total Income** **128,238**

**Expenses:**

**500000 PAA Scholarships/Programs** **73,450**

510000	Scholarships	15,000
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520000	Social Action	
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523000	I Believe I Can Fly	2,000
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526000	Boreholes in Ghana / Rx Catering	2,000
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530000	Talent Hunt	2,200
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540000	Achievement Week	
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541000	Psi Alpha Alpha Booklet	5,000
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542000	BLB Sponsorship	750
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	Banquet	9,000
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550000	Golf Tournament	11,000
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	Psi Alpha Alpha	1,000
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	NVSBBC Sponsorship	1,500
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560000	Fundraising (Sponsors/Raffle)	2,000
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561000	New Year's Eve Event	22,000
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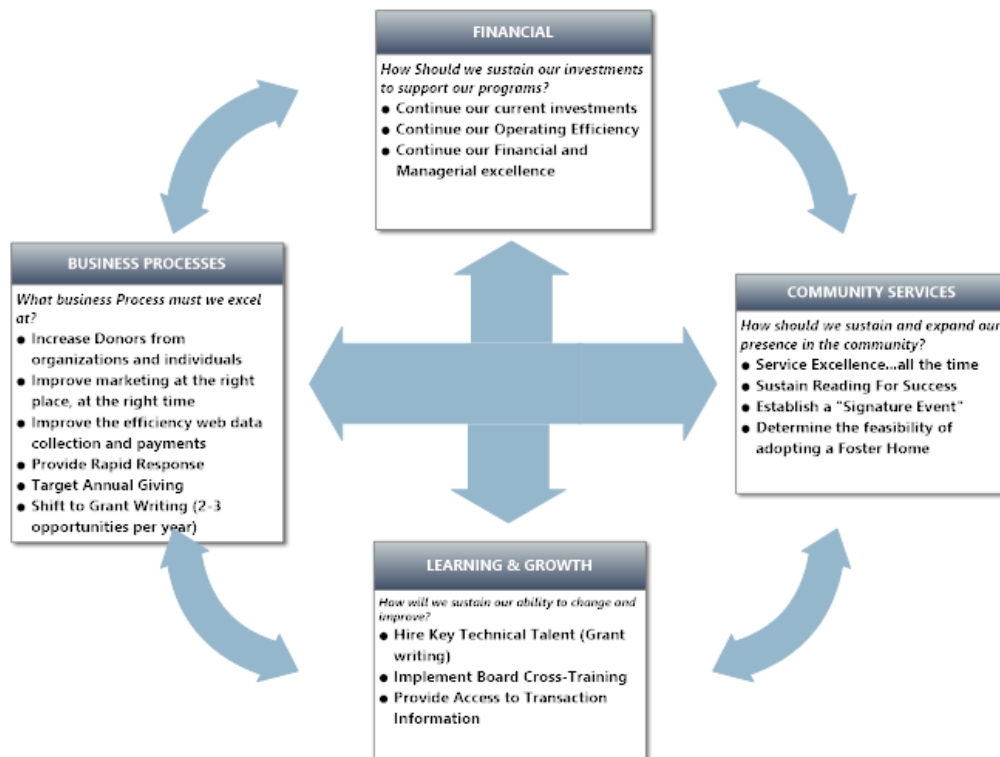
<b>600000 Bernie Bates Scholarships</b>	<b>11,400</b>
601000 CFC Expenses	400
602000 Bill Dickey Scholarship Association	500
603000 Scholarships (Encumbrances)	10,500
<b>610000 Community Recognition</b>	<b>2,000</b>
611000 Students	
<b>620000 Student Awards Breakfast</b>	<b>6,500</b>
<b>630000 Fairfax County Foster Care</b>	<b>1,000</b>
<b>640000 Reading For Success</b>	<b>300</b>
<b>650000 MANUP Mentoring</b>	<b>6,000</b>
<b>660000 National Museum of African American History and Culture</b>	<b>500</b>
<b>670000 Investments</b>	<b>5,000</b>
<b>680000 Omega Charities</b>	<b>1,000</b>
681000 Youth Academy Program	500
682000 Third District Foundation	500
<b>690000 Administrative Fees</b>	<b>3,000</b>
<b>700000 Information Technology (IT)</b>	<b>6,288</b>
Software and Development (MobileCause annual renewal)	3,688
Service Charges (incl. Zoom and MobileCause monthly fee)	2,000
Website Maintenance	600
<b>710000 Sponsorship and Marketing</b>	<b>1,500</b>
711000 Public Relations	500
712000 Third District	250
713000 Corporate Development	750
<b>720000 Contingency (President Discretionary)</b>	<b>500</b>
<b>730000 Endowment (George Mason Univ)</b>	<b>1,000</b>
<b>740000 Meetings and Storage</b>	<b>1,300</b>
<b>750000 Privilege Award</b>	<b>7,500</b>
Venue Expenses	4,500
Other Expenses	3,000
<b>Total Expenses</b>	<b>128,238</b>

# 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.

**“Creating a culture of integrity and accountability not only improves effectiveness, it also generates a respectful, enjoyable and life-giving setting in which to work.” – Tom Hanson**



## 2022 – A Year of Challenge, a Year of Opportunity

The Foundation hosted its inaugural Privilege Award and Community Recognition Event



The Privilege Award, a Bernie L. Bates Foundation Inc. Community Recognition event is designed to recognize members of the Fairfax community who have most closely followed the tenets and principles practiced by the late “Lord Fairfax” and Foundation Director Emeritus Col. Marion L. “Barney” Barnwell, USA, (Ret.), a pillar in the Fairfax County community and a guiding light, mentor, and counselor to those who were privileged to sit at his table.

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QR code for Recipient  
Bios/Annual Report



Dear Friend, thank you so much for your support of this signature event!  
Follow the work of the foundation at [www.blbinc.org](http://www.blbinc.org).

Donations are always welcomed at:  
<https://www.blbinc.org/donate>

**THANK YOU!**

BERNIE L. BATES FOUNDATION, INC.

# Board of Directors



*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 six times a year.





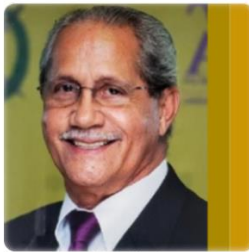
# "Remarks & Acknowledgements"



*"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



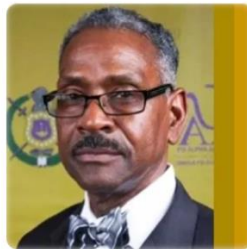
**Treasurer**  
Jeffrey L. Owens



**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