Mission

To induct as lifetime Members of the Association contemporary role models whose experiences exemplify that opportunities for a successful life are available to all individuals who are dedicated to the principles of integrity, hard work, perseverance, and compassion for others.

To provide scholarship assistance to deserving young people who have demonstrated integrity and determination in overcoming adversity in their lives and who have shown the academic potential and personal aspiration to make a unique contribution to society.

To mentor Association scholarship recipients and educate youth about the limitless possibilities that are available through the American free-enterprise system, while underscoring the importance of service to others.

About Us

The Horatio Alger Association of Distinguished Americans, Inc., a 501(c)(3) nonprofit educational organization, was established in 1947 to demonstrate to American youth that the free-enterprise system offered—and would always provide—unlimited opportunities for those seeking to achieve the American Dream.

To inspire his fellow citizens to strive for their highest potential, Dr. Kenneth Beebe harkened back to popular nineteenth century author Horatio Alger, Jr., who wrote stories about young people overcoming adversity through self-reliance, perseverance, and strong moral principles. Dr. Beebe created the Horatio Alger Award to recognize individuals whose life stories clearly demonstrate that anyone could come from humble beginnings and still achieve the heights of success, if they were willing to prepare for and seize opportunities. To date, the Association has inducted more than 700 men and women whose lives demonstrate that the road to success is not a straight line. Rather, it is a road filled with challenges along the way, but it is how these individuals overcome challenges that serve as testimony to the Horatio Alger Association’s founding premise: through hard work, education, perseverance, and the free-enterprise system, success is attainable for all.

By 1984, it became evident to the Association’s membership that more needed to be done to help promising youth who were struggling with financial need and other adversities. Today, the Horatio Alger Association—which is fully funded by Horatio Alger Members and Friends—has awarded more than $159 million in undergraduate and graduate need-based scholarships to 25,000 young people across the United States and Canada. This year alone, the Association is on track to award more than $16.3 million in scholarships. It also provides a host of other services to assist its young Scholars.

In 2009, the Association expanded its mission northward by incorporating the Horatio Alger Association of Canada as a Canadian charitable organization. This provided our International Members with a means to support scholarship programs for Canadian youth. We are proud to highlight the rapid expansion of the Canadian Association in this annual report.

Many Horatio Alger scholarships were endowed in perpetuity with the establishment in 2011 of the Horatio Alger Endowment Fund, and the successful completion of the Investing in America’s Future Endowment Campaign. The permanence of Horatio Alger scholarship programs clearly demonstrates not only the generosity of Horatio Alger Members, but also their dedication to and firm belief in the organization’s mission.

Horatio Alger Association Diversity Statement:

The Horatio Alger Association, a 501(c)(3) educational nonprofit organization, values diversity and is committed to creating an inclusive environment for all employees. The Association is an equal opportunity employer that does not discriminate on the basis of race, color, religion, creed, sex, gender identity, sexual orientation, marital status, parental status, national origin, political affiliation, age, disability, or any other protected status. All employment decisions are based on merit and individual qualifications, performance, business needs, and job requirements. The Association is also committed to maintaining an environment that encourages and fosters appropriate conduct among all persons and respect for individual values. The Association’s policies, as outlined above, extend beyond its staff to its Members, Scholars, Alumni, volunteers, associates/contractors/vendors, and affiliates.
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[Certificate Image]

**CHARTY NAVIGATOR**

recognizes
Horatio Alger Association of Distinguished Americans

as a 4-star rated charity
May 1, 2018

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*Horatio Alger Association* 2018-2019 Annual Report
Leadership Message

We are a forward-looking organization. The Association’s founder, Dr. Kenneth Beebe, was looking to the future when 70 years ago he established its mission to educate American youth about the benefits of free enterprise, coupled with the values of hard work, perseverance, and integrity. This nation’s youth was told that if they embraced those values, the American Dream was attainable for all. We believed in that message then, and we believe in it today.

But has the dream changed? Are we all in agreement about the definition of the American Dream? As we move toward our 75th anniversary celebration to embrace current goals that enhance our mission and expand our message, now is a good time to restate why we exist as an organization.

The Horatio Alger Association inducts Members whose lives exemplify the concept of self-made success. They hail from humble beginnings or challenging circumstances, which they overcame through their own diligence and ambition, to go on to achieve great success. In 1984, we expanded from being a membership organization to one that grants college scholarships to youth who also come from humble means. We use the life stories of our Members to illustrate to these promising young people that they too can take advantage of the opportunities that free enterprise offers to all citizens—especially if they are prepared for those prospects by continuing their education.

Since then we have become one of the nation’s top scholarship-granting organizations. Through the generosity of our Members we have awarded more than $159 million to more than 25,000 young people. And our Scholars have done well. They have a college graduation rate of 70 percent, compared to the national rate of 70 percent, and for their low-income peers a 14 percent graduation rate.

We can all agree that a college education or professional/career certification are the first steps toward achieving one’s full potential in the work place, but the cost of higher education has risen sharply in the last 20 years. In 1993, about half of students graduated with debt that averaged $10,000. Today, more than two-thirds of students graduate with an average debt of $35,000. College student debt has tripled in two decades. Since 2000, family income has been flat, making it impossible for most families to keep up with the sharply rising college tuition rates.

This is why the Horatio Alger scholarship and career technical programs are having an impact, and why our Members are making a positive difference in the lives of young people. If the Association’s current giving rates continue, by 2022—our 75th anniversary—we will have awarded more than 40,000 students college and career technical scholarships in the amount of $215 million.

We believe today’s youth can and should reach for the American Dream. For our Association, the American Dream is freedom, mutual respect, and equality of opportunity. Our programs work to reinforce that message to youth. It’s a powerful message and a powerful dream—one we can ALL achieve.

Byron D. Trott
HAA Chairman
Matthew K. Rose
HAA President
Walter Scott, Jr.
HAA Chairman Emeritus
Barbara Barrett
HAA Vice President
Paul Anthony Novelly
HAA Immediate Past Chairman
Anthony Welters
HAA Treasurer
Dennis R. Washington
HAA Chairman Emeritus

V. Prem Watsa
HAA Executive Committee
Horatio Alger Association of Canada President
David L. Sokol
HAA Chairman Emeritus
Joseph Neubauer
HAA Chairman Emeritus
Al Annexstad
HAA Member-at-Large
James F. Dicke II
HAA Member-at-Large
Greg Renker
HAA Member-at-Large
James H. Seneff, Jr.
HAA Board Member

Horatio Alger Association 2018-2019 Annual Report
Freedom. Mutual respect. Equality of opportunity. These are key elements of the American Dream as personified by the Members of the Horatio Alger Association of Distinguished Americans. They also are the values being transmitted to today’s young people through the educational and scholarship programs provided by the Association’s Members and Friends.

These enduring values are imbued in America’s distinct form of democracy. Over past decades, global and national events have tested our commitment to these core values. Each test has been met with resilience and a deepened commitment to ensure that the American Dream is still possible for those who are willing to work hard and persevere.

Our Members have achieved the American Dream and are committed to sharing it with today’s and future generations.

Where the Association Stands—and Where It Is Heading

This report highlights the achievements of the Association, but it also encompasses its goals, designed to strengthen and broaden the future course. Many of these initiatives are already underway and have been identified by the Executive Committee and Board of Directors as priorities:

- Invest in the prominence and value of the Horatio Alger Award and identify exemplary future Members.
- Use best practices in governance and finance to maximize the investments of Members and Friends.
- Facilitate the Horatio Alger Association’s outreach through regional meetings and State of the Association events held across the U.S. and Canada to raise awareness about its mission, Members, the values represented in the Horatio Alger Award and its educational programs and services.
- Continue to invest in visibility initiatives to better communicate the mission and goals of the organization.

Endowment Goal: Scholarships Awarded in Perpetuity

In 2011, the Association had achieved $80 million of its $100 million endowment goal, a benchmark that had taken 22 years to accomplish.

Chairman Tony Novelly then set a new goal of $250 million with a four-year deadline. Not surprisingly, through the strong leadership of the Executive Committee and Board of Directors and the generosity of the membership, the Chairman’s challenge was met in September 2015, with nearly $250 million in donations.

Our Members have achieved the American Dream of freedom, mutual respect, and equality of opportunity. They are committed to sharing it with today’s generation through their investment of time and $16.3 million of educational programs and scholarships each year.
$18 million being transferred from the operating fund toward the endowment fund goal.

The history of the Horatio Alger Association’s giving represents admirable— and amazing— growth. In 1984, the Association awarded seven scholarships totaling $35,000. Since 1984, 25,000 students have been awarded scholarships representing more than $159 million.

Reflecting the success of the capital campaign, National Scholarships have been increased to $25,000 each and State Scholarships to $10,000 each. In 2018, 2,024 scholarships were awarded totaling $16.3 million.

If giving continues at the current rate, 40,000 scholarships representing $215 million will have been awarded by 2022—the Association’s 75th anniversary.

Planning for the American Dream

The American Dream of freedom, mutual respect and equality of opportunity does not occur by chance. It is the result of planning, insistence on excellence, accountability, determination, and hard work. To provide future opportunities for Members, Scholars, and Alumni, the Board of Directors and staff are engaged in continuous efforts to ensure that the Association has the human and financial resources to provide financial management, research and program development, excellent governance, and visibility.

Financial Management and Governance

The Association teams with national experts who use best practices in advancing its endeavors, including financial management skills from Tate & Tryon (best practices in governance), RSM (formerly McGladrey, annual audit), and Halt Buzas & Powell (the Association’s independent accounting firm).

Education and research expertise comes through collaboration with educators and researchers on the Association’s Educational and Research Advisory Committee as well as from leading universities throughout North America. The Association also engages Webster Chamberlain & Bean, a nonprofit and tax-exempt law firm in Washington, D.C. Mercer, a global consulting leader in talent, health, and investment, works with the Association on human resource management.

Focus on the Horatio Alger Award Selection Process

The Strategic Directions Committee, co-chaired by Ambassador R. James Nicholson and Ambassador Barbara Barrett, continues to identify new ways to promote awareness about the Award and refine the process for selecting nominees. This has enhanced the selection process for the induction of new Members conducted by the Board of Directors each year. The Board’s success can be measured by the increasing number of new Members who participate in subsequent Awards events, State of the Association meetings, and active participation on the Board and its committees.

Visibility and Communication

The national visibility campaign heightens understanding about the values promoted by the Association through the presentation of the Horatio Alger Award as well as the attributes of its Members. Coverage has included the Wall Street Journal, Forbes, the Washington Post, and PBS broadcasts of Horatio Alger concerts, among other communication outlets and platforms.

Four Stars from Charity Navigator

Under President Byron Trott’s leadership, the Association has been recognized for excellence by organizations such as Charity Navigator, which recently accorded its second consecutive highest rating—four stars—to the Horatio Alger Association for fiscal and governance transparency and the high percentage of funds spent on mission-centered programs.

The Association’s methodology of accounting for expenses through program budgeting is presented on page 41. Through this allocation system, used by highly rated nonprofits, Members and the Board of Directors are able to fully understand the actual costs of conducting every program or service of the Association.

Philanthropic gifts from Members and Friends of the Association provide 100 percent of the funding for the programs and services for Members, Life Partners, Alumni, and Scholars. The Board of Directors is an effective steward of the organization’s resources. One indicator is that 95 percent of all contributions are spent on programs, scholarships, research, and educational opportunities.
Expanding Vital Partnerships

Partnerships with educational and youth-serving organizations are vital to ensuring that the appropriate young people are applying for scholarships and learning about the American Dream.

The Association was honored to be asked by the prestigious College Board to partner with seven other national organizations to identify at-risk students who may benefit from the Horatio Alger Association’s programs.

The partnership with the College Board complements the existing Strategic Partners of the Horatio Alger Association described on pages 28–29. These partners serve to promote awareness about HAA scholarships among their constituencies.

Anticipating the Changing Landscape—Focus on Vital Career Technical Training

Never resting on legacy, the Executive Committee and Board of Directors continue to seek mission-centered program opportunities to expand programs and services in response to the changing educational landscape in the United States and Canada.

Chairman Emeritus and Endowment Fund Chairman and President Walter Scott, Jr., identified an opportunity in the Association’s scholarship programs in 2015, resulting in the establishment of the Career Technical Scholarship Program in partnership with community colleges across the nation. Initially piloted in California and Nebraska, the national scholarships may be used to attain training and certification in a range of vocational programs.

The response to the new program has been dramatic, resulting in more than 1,000 scholarships awarded this year. The initiative is addressing a strategic need—preparing young people for promising futures, based on their own talents and vision of the American Dream.

Entrepreneurship Education Online

In partnership with the University of North Carolina at Wilmington, the Association now offers current Scholars and Alumni the opportunity to enroll in accredited online courses in entrepreneurship and personal finances. More online programs and webinars are on the drawing board for the future.

Graduate Grants and the Global Summit

Having successfully implemented the Dennis R. Washington Leadership Scholarship Program to support the advanced studies of Horatio Alger Alumni Scholars, the next step was deemed to offer a highly focused Global Summit for Alumni. The first summit was held in July 2017 in England and France. Participants had a life-changing educational opportunity that underscored leadership and business.

The Whole Scholar...Not Just a Check

Beyond the classroom, Chairman Emeritus David Sokol has moved the organization forward from “just giving a check” to recognizing the needs of the whole student. Scholars now receive financial aid and social counseling, internship and job placement opportunities.

A wide support system helps ensure timely graduation from college. Of special note, the Horatio Alger staff provides ongoing personal contact through college, social media, email, phone calls, e-newsletters, letters and cards.

Developing Cutting-Edge Curriculum for Scholars That Embraces the American Dream of Freedom, Mutual Respect and Equality of Opportunity

In addition to having met a long-range goal of offering the full complement of post-secondary opportunities from career and technical training through doctoral degree programs, the Association has significantly enhanced the curriculum of the National Scholars Conference.

Held in conjunction with the annual Horatio Alger Awards Induction Ceremonies, the four-day program has been expanded to focus on:

- Student awareness of civic responsibilities and opportunities provided through the free-enterprise system
• Preparation for students to succeed in college with sessions about choosing a major field of study, financial aid, loans, debt management, study skills, time management, goal setting, and navigating college campus resources

• Small group sessions with Horatio Alger Members as the faculty

• Briefings about the many ways the Association can support lifelong learning in college and beyond, as the basis for ongoing relationships with the Scholars

• Follow-up communications after the Scholars Conference, including outreach by Alumni, to ensure that Scholars complete their degree on time

• Inclusion of the Canadian Entrepreneurial Scholars (National Scholars from Canada sponsored by the Horatio Alger Association of Canada) in the Washington-based program. This has provided new perspectives from Scholars in both countries regarding the similarities and differences of our nations, further defining what the American Dream means for young people in North America.

Enhancing Technology and Social Media to Engage Members, Life Partners, Friends, Scholars and Alumni

Using his expertise in direct-response marketing, Association Member Greg Renker worked with Brian Communications, the Association’s public relations firm, to audit and review marketing, branding, and communication initiatives.

The results of these findings will help the organization better employ new technology to sharpen its outreach and expand its marketing communications.

The Association has active websites in the United States and Canada, which are updated constantly with new information. In addition, Facebook, Twitter, and Instagram are used year-round with a special emphasis during the Awards Induction Ceremonies.

Research

Chairman Emeritus Joseph Neubauer’s commitment to research has transformed the Association’s approach to educational and scholarship programs.

Established initially through national surveys of American youth, today’s research initiatives are engaging leading scholars from the United States and Canada who are committed to understanding the role of resiliency and the educational challenges of our Scholars, as well as broader issues impacting youth in the United States and Canada.

The State of Our Nation’s Youth survey continues to be highly regarded by educators, academicians, and practitioners. The Horatio Alger Association of Canada has conduct a similar survey in Canada.

In 2017–2018, the Educational Policy and Research Advisory Committee is developing a framework for research to complement their studies in resiliency, including a research initiative that should lead to better understanding and support of career development for low-income yet upwardly mobile Scholars.

For example, the Association’s college graduation rate of 70 percent, contrasted to the national average of 14 percent for low-income students, demonstrates that, despite histories of poverty and adversity, students can achieve in higher education and attain the American Dream. The research agenda for the year ahead will examine the factors that influence Scholars’ educational and career aspirations.

Making the American Dream Possible in the United States and Canada

As the Association plans for the future, it will soon be time for a special salute to V. Prem Watsa, president of the Horatio Alger Association of Canada, and the Canadian Association as it marks its 10th anniversary in 2019.

This—and all of the initiatives—are possible through the dedication and commitment of the Association’s Members. Each new idea and new approach is vetted by the Strategic Directions Committee prior to submission to the Board of Directors. Our goal is to be certain that all of our actions are planned in a strategic, cost-effective manner that relies on best practices, transparency, and the engagement of our Members.

Freedom. Mutual respect. Equality of opportunity. The Members of the Horatio Alger Association of Distinguished Americans embrace this American Dream. In this way they provide the greatest gift possible to future generations—the opportunity for young people to find and forge their own American Dream.

Terrence J. Giroux, Executive Director
Membership Programs

The men and women selected to receive the Horatio Alger Award exemplify what can be achieved—despite humble beginnings or daunting challenges—by seizing opportunities and working hard to bring goals to fruition. But Horatio Alger Members are more than hard workers. They are dedicated corporate, civic, and cultural leaders who inspire and motivate others to achieve their dreams through ingenuity, perseverance, and integrity.

Since its founding in 1947, the Horatio Alger Association has inducted 743 individuals whose life’s work in the realms of science, medicine, business, government, entertainment, sports, law, religion, education, and the arts have served society at the highest levels. While their achievements are a result of their own hard labor and fortitude, Members are quick to say that their advancements came to them through the help of a mentor, a teacher, an inspirational employer, or a family member who counseled and inspired them. In this way, Members know the full value of extending a helping hand to those who are striving to succeed. They are civic-minded in support of their communities and generous in the expenditure of time and resources in their philanthropy.

Horatio Alger Members are dreamers who never give up on their dreams. They plan, listen and learn, and then they achieve. As role models they serve as reminders of what can be accomplished through tenacious and passionate pursuit of goals. Today’s 300 living Horatio Alger Members take part in the Association’s programs and services as a way to give back and affirm their values and beliefs in self-determination and the free-enterprise system.

Horatio Alger Awards

Annually, the Horatio Alger Awards Induction Ceremonies are held over a three-day period in Washington, D.C. The events include the bestowing of membership medallions to the honorees, with full induction taking place during the Awards Induction Ceremony on the second evening of events. The National Scholars Conference is hosted concurrently each year for the newest Scholars who have won National Scholarships in the United States and Canada. In addition to learning practical information about how to succeed in college, these young people meet on several occasions with the Members at events designed to inspire, motivate, and teach what can be accomplished by being prepared for and seizing opportunities.
71st Horatio Alger Awards (April 5-7, 2018)

In 2018, the Association had the privilege of welcoming nearly 1,000 Members and guests at the 71st Annual Horatio Alger Awards Induction Ceremonies to celebrate the induction of 12 distinguished new Members.

**Gregory E. Abel**
Vice-Chairman, Non-Insurance Business Operations
Berkshire Hathaway Inc.
Executive Chairman, Berkshire Hathaway Energy

**Ronald M. Bergeron, Sr.**
Founder & CEO
Bergeron Land Development, Inc.
Bergeron Family of Companies
Bergeron Properties & Investment Corp.

**Don R. Daseke**
Founder, Chairman, & CEO
Daseke Inc.

**Alphonso R. Jackson**
CEO, A.R. Jackson Advisors LLC
13th U.S. Secretary of Housing and Urban Development

**David Johnston**
(International Horatio Alger Award Recipient)
Chair, Rideau Hall Foundation
28th Governor General of Canada

**Larry Lawson**
Founder & CEO
HeartcoR Solutions, LLC

**James J. Liautaud**
Founder, Chairman, & Owner
Jimmy John’s Gourmet Sandwiches

**Rob Lowe**
Film & Television Actor, Producer, Writer, Director, & New York Times Best-Selling Author

**Reba McEntire**
Multimedia Entertainer & Entrepreneur

**James H. Pugh, Jr.**
Chief Executive Officer, Owner, & Chairman
Epoch Residential

**Ernest S. Rady**
Founder, Executive Chairman of the Board, Chief Executive Officer, & President
American Assets Trust, Inc.
Founder & Executive Chairman
ICW Group Insurance Companies

**H. Lee Scott, Jr.**
Former President, CEO, & Chairman of the Executive Committee
Walmart Stores, Inc.

In addition to the induction of the 2018 class of new Members, the Association recognized 106 National Scholars, five National Canadian Entrepreneurial Scholars, and five recipients of the Trott Family Scholarship. These Scholars were inspired by the life stories of Horatio Alger Members, and throughout the Awards events they learned more about the opportunities available through free enterprise.
Byron Pitts ('17) and Tom Selleck ('00) served as co-masters of ceremonies during the 71st Awards Induction Ceremony at DAR Constitution Hall.

The Inaugural Dinner featured performances by Chris Botti.

New Member James H. Pugh, Jr., conversing with 2018 National Scholars.

Chairman Byron D. Trott ('11) and President Matthew K. Rose ('13).

New Member Alphonso Jackson shares his experiences with a 2018 National Scholar.
The Norman Vincent Peale Award—the Association’s highest honor—was bestowed on David L. Sokol ('04) and Paul Anthony Novelly ('00) during the 71st Horatio Alger Awards Induction Ceremonies in Washington, D.C., April 5–7, 2018. Each of them has served seven years in office as President and as Chairman. Under their leadership, the Association reached its goal of $250 million in the endowment fund, the National Scholarship increased to $25,000, and the State Scholarship increased to $10,000. In addition to the service they have given to the Association, Peale Award recipients have made exceptional humanitarian contributions to society and have exhibited courage, tenacity, and integrity in the face of challenges.

David L. Sokol ('04) and Paul Anthony Novelly ('00), the 2018 recipients of the Norman Vincent Peale Award.
The 2017 Membership and Board of Directors Meeting took place on September 13–15, 2017, at the Park Hyatt Hotel in Chicago, Illinois. Association President Byron Trott and his Life Partner, Tina Trott, served as hosts of the social events, which included a welcome dinner at their home and a concluding dinner with entertainment at the Art Institute of Chicago. The weekend included meetings of the Executive Committee and Horatio Alger Endowment Fund Board, the Association’s Board of Directors, and the Membership. Participants reviewed recent progress and planned for the Association’s future.
Chairman Byron Trott (’11) and Life Partner Tina Trott hosted the 2017 Membership and Board of Directors Meeting.

Members of the Executive Committee and Endowment Fund Board at a breakfast meeting.

Dr. Nido Qubein (’06) led a panel discussion with Horatio Alger Scholars: Austin Kazarian (’10 National Scholar), Nadia Marston (’06 Delaware Scholar), Adam Scigliano (’17 National Scholar), and Alex Scigliano (’17 National Scholar).

Dr. Valerie Montgomery Rice (’17) led a panel discussion with (l to r) Dr. Mack Armstrong, Dr. Gregory Wolniak, and Dr. Brian Victor, titled: Generation Z: Understanding Horatio Alger Freshmen Scholars and Their Peers Nationwide.
Members of the Executive Committee (L to R): Matthew K. Rose (’13), Dennis R. Washington (’95), Paul Anthony Novelly (’00), and Byron D. Trott (’11).

Board Members discuss the future of the Association at the 2017 annual meeting.

FUTURE MEMBERSHIP AND BOARD OF DIRECTORS MEETINGS

2018 Membership and Board of Directors Meeting
October 4–6, 2018 | Washington, D.C.
Note: This event will overlap with the 2018 Alumni Summit so that Members, Life Partners and Alumni will have opportunities to meet and jointly participate in a special “Evening of Achievement” at the John F. Kennedy Center for the Performing Arts on October 6, 2018. The evening will include dinner, a musical program, and the announcement of the first Horatio Alger Alumnus who will be inducted as a Member of the Association during the 2019 Awards events.

2019 International Membership and Board of Directors Meeting
October 2–4, 2019 | Montreal, Quebec
In celebration of the Horatio Alger Association of Canada’s 10th anniversary in 2019, the Association’s U.S. and Canadian Boards of Directors will host a joint meeting in Montreal. The full membership from both countries is encouraged to participate in the meeting.
State of the Association Meetings

Periodically, the Association hosts State of the Association Meetings at locations around the country. In this way, Members, Life Partners, and Friends convene regionally to become better acquainted with Association programs and goals. Often, these events are held in conjunction with Horatio Alger concerts, which raise awareness about the Association’s Members, mission, and educational programs.

Recent State of the Association Meetings included the following:

- **January 11, 2017**: Dinner at the Old Parkland Memorial in Dallas, Texas, which was hosted by Barbara and Steve Durham in appreciation of then Association Vice President Matthew K. Rose (now serving as president) and in celebration of the Association’s 70th anniversary.

- **February 14, 2017**: Dinner with entertainment at the home of Phyllis and Dennis Washington in Indian Wells for Members from the Southern California region.

- **March 1, 2017**: Event in honor of 2017 Award Recipient Harold B. Matzner was hosted by Joan Dale and R.D. Hubbard at the Big Horn Golf Club in Palm Desert, California.

- **February 28, 2018**: Event in honor of 2018 Award Recipient James H. Pugh, Jr., was hosted by Harvey Massey, Clarence Otis, Jr., and James M. Seneff, Jr., at the Dr. Phillips Center for Performing Arts in Orlando, Florida.

Friends of the Association, Barbara and Steve Durham, hosted a dinner at the Old Parkland Memorial in Dallas, Texas, in appreciation of Matthew K. Rose (‘13), who now serves as the Association’s president.

Phyllis and Dennis Washington (‘95) hosted a regional dinner at their home in Indian Wells, in Southern California.

Members at the Big Horn Golf Club event in Palm Desert, California (l to r): Al Annexstad (‘10), R. D. Hubbard (‘14), Dennis Washington (‘95), Harold Matzner (‘17), Harry Rinker (‘09), Duane Hagadone (‘04), and Greg Renker (‘12).

State of the Association Meeting in Orlando on February 28, 2018 (L to R): Alex Scigliano (‘17 National Scholar), James M. Seneff, Jr. (‘10), Honoree James H. Pugh, Jr. (‘18), Harvey Massey (‘16), Adam Scigliano (‘17 National Scholar).
Support for the Excellence Gala will underwrite scholarships for students in Canada. In 2018, the Horatio Alger Association of Canada awarded $650,000 to 130 deserving young Canadians.

EXCELLENCE GALA
6:00 P.M. | OCTOBER 30, 2018 | TORONTO, ONTARIO

THE 2018 EXCELLENCE GALA
Provides an opportunity to honor the 2019 International Award Recipient and to celebrate Canadian Scholars.

For more information, contact gala@horatioalger.org or visit www.horatioalger.ca
This fall the Horatio Alger Association of Canada will host the second Excellence Gala to celebrate its Members, all of whom are Canadians who have demonstrated perseverance and achieved great success in life. This event will also serve as a fundraising opportunity to further increase the number of Canadian scholarships awarded annually. This event has become the Canadian Association’s annual signature event, similar to the Awards Induction Ceremony in the U.S.

Formed in 2009, the Horatio Alger Association of Canada began its first Canadian scholarship program for students in Ontario in 2012. By 2015, Horatio Alger Members generously created a $10 million endowment, which enabled the scholarship program to expand throughout all Canadian provinces and territories in 2016. To date, the Horatio Alger Canadian Scholarship Program has awarded $3.19 million to 645 Scholars.

Horatio Alger Association of Canada Board of Directors

Annually, the Canada Association awards 130 Horatio Alger scholarships to deserving high school and CEGEP students in financial need who have overcome significant adversity and are dedicated to the goal of achieving higher education. In 2019, the number of scholarships awarded to Canadian youth will increase to 245 scholarships valued at $1.23 million. These young people have great potential, and the Members of the Canadian Association see them as beacons of a bright future for the country.

All Horatio Alger Members are welcome to attend this event, which will serve as a celebration of the progress made by the Horatio Alger Association of Canada and act as a springboard for even greater achievements in the future.
Class Coordinators

Class Coordinators reach out to Members of their respective classes to encourage participation at Association events, sponsorship for its educational programs, and support for its long-term interests through the Horatio Alger Endowment Fund. The Association is grateful to the following Members for serving as Class Coordinators.

Gregory E. Abel, 2018
Reba McEntire, 2018
Valerie Montgomery Rice, 2017
Lenard B. Tessler, 2017
Harvey L. Massey, 2016
James F. Dicke II, 2015
Mike Jackson, 2014
Patrick P. Lee, 2013
John H. Weiland, 2012
Glenn B. Stearns, 2011
Al Annexstad, 2010
Michael G. Morris, 2009
Lee E. Mikles, 2008
Chris Sullivan, 2007
Doris K. Christopher, 2006
Ronald M. Simon, 2005
Duane B. Hagadone, 2004
Harry S. Rinker, 2003
Charles L. Overby, 2002
Bill Greehey, 2001
R. James Nicholson, 2000
Sidney D. Wolk, 1999
Anthony Welters, 1998
John F. Grundhofer, 1997
Melvyn N. Klein, 1996
Herbert F. Boeckmann II, 1995
Terry M. Giles, 1994
George L. Argyros, 1993
Richard L. Knowlton, 1992
David L. Sokol, 1991
James R. Moffett, 1990
Thomas S. Haggai, 1980–1989

Horatio Alger Archival Collection

With support from the late John Silber (’92), the Horatio Alger Association established the Horatio Alger Archival Collection at Boston University’s Howard Gotlieb Archival Research Center in 2009. The collection serves as a means to preserve important documents about the Association’s history and biographical information about its Members. Horatio Alger Members are encouraged to direct information about their life experiences to the Archive in care of the Association. In this way, future generations may be inspired by the Members’ life stories of great success in spite of humble beginnings and adverse challenges.
Archiving Horatio Alger Audio and Video Recordings

The Association is digitizing hundreds of archived video recordings and video tapes from decades of Horatio Alger events. Examples of items included in the archive are audio recordings of Eddie Rickenbacker’s acceptance speech when he received the Horatio Alger Award in 1956—presented to him by the Association’s founder, Kenneth Beebe; also Dr. Norman Vincent Peale ('52) presenting the award in 1972 to Ray Kroc, the founder of McDonald’s Corporation. The Association’s video collection dates back to 1978. These materials are a valuable resource in preserving the Association’s history and the stories of its Members and Scholars.

Horatio Alger Collection Series

The Association created a new brochure for the 71st Horatio Alger Awards event, which highlights the jewelry and specialty items available for purchase by Members and Life Partners. The brochure includes the newest items, such as the Liberty Eagle brooch and “The Star-Spangled Banner” Halcyon Days enamel box (shown below) and new jewelry selections from Mystique Jewelers. Net proceeds from the Horatio Alger Collection Series are contributed to the Association’s scholarship fund.
Educational & Alumni Programs

The Horatio Alger Association began awarding college scholarships in 1984. Today, in addition to its National Scholarship Program, it awards State Scholarships to students in every state along with scholarships for career/technical studies, advanced degrees, and special awards. Scholarships are also awarded to students throughout Canada’s provinces and territories. The Association administers 75 Horatio Alger scholarship programs, and has awarded more than $159 million in scholarships to nearly 25,000 young people.

More than 5,500 Horatio Alger Scholars are currently attending college. The Association provides them with financial aid and personal counseling, internship opportunities, online courses, and other meaningful support services to help ensure completion of their college education. The Association is proud of the Scholars’ college graduation rate of 70 percent compared to the national average of 14 percent for low-income students.

In 2004, the Horatio Alger Alumni Association was formed to give Alumni National and State Scholars opportunities for further involvement with the Horatio Alger Association. Now a vibrant organization in its own right, Alumni Scholars volunteer to participate in a supportive mentoring program designed to help their younger peers adjust to and then graduate college. Alumni also volunteer at Association events and serve as Field Directors in their home states. Alumni Summits provide networking and career development opportunities every three or four years.
Scholarship Programs

In 2018, the Association received more than 46,000 applications in the United States and Canada and awarded 2,061 scholarships valued at $16 million.

<table>
<thead>
<tr>
<th>Type</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>National</td>
<td>106</td>
</tr>
<tr>
<td>State</td>
<td>633</td>
</tr>
<tr>
<td>Specialized</td>
<td>162</td>
</tr>
<tr>
<td>Career &amp; Technical</td>
<td>1023</td>
</tr>
<tr>
<td>Canadian</td>
<td>85</td>
</tr>
<tr>
<td>Canadian Specialized</td>
<td>45</td>
</tr>
<tr>
<td>Graduate</td>
<td>7</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>2,061</strong></td>
</tr>
</tbody>
</table>

**National Scholarship Program**

In 2018, the Association awarded 106 National Scholarships valued at $25,000 each. These recipients participate in the four-day National Scholars Conference in Washington, D.C., held concurrently with the annual Horatio Alger Awards Induction Ceremonies. They were joined by recipients of the Canadian Entrepreneurial Scholarship and Trott Family Scholarship.

The National Scholars Conference curriculum is based on four goals to:

- Educate Scholars about civic responsibilities and opportunities available through the free-enterprise system, while encouraging them to pursue their own versions of the American Dream inspired by the life stories and examples of Horatio Alger Members.
- Advise Scholars about strategies for successfully navigating the first-year college experience.
- Inform Scholars about the ways the Horatio Alger Association is prepared to support them during their college years as well as post-graduation.
- Establish the foundation for lifelong relationships. Scholars have numerous opportunities throughout the conference to meet with Members, Life Partners, current and Alumni Scholars, and staff, as the basis for what the Association hopes will be lifelong relationships.

**Profile of the Current Class of Horatio Alger National Scholars:**

**2018 Horatio Alger National Scholars:**

- Average High School GPA: 3.79
- Average SAT score (out of 1600): 1217
- Average ACT score (out of 36): 27
- Average Household Income: $12,648
- Average Number in Household: 3
- Scholars Working during the School Year: 62%
State and Specialized Scholarship Programs

In 2018, the Association awarded 633 Horatio Alger State Scholarships, valued at $10,000, to students in all 50 states and the District of Columbia.

The Association also administers specialized scholarship programs, which target support to students based on residency (specific state/province/region), attendance at specific postsecondary institutions, or pursuit of a defined degree program. In 2018, the Association awarded 162 specialized scholarships through the generous support of Members, Friends, and partner organizations. Specialized scholarships allow the Association to assist more deserving young people, while serving its Members by administering specific scholarship programs based on the vision of the sponsor.

Profile of Current Class of Horatio Alger State and Specialized Scholars:

<table>
<thead>
<tr>
<th>2018 State and Specialized Scholars</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Average High School GPA:</td>
<td>3.68</td>
</tr>
<tr>
<td>Average Household Income:</td>
<td>$18,003</td>
</tr>
<tr>
<td>Average Number in Household:</td>
<td>3</td>
</tr>
</tbody>
</table>

Canadian Scholarship Programs

In 2016, for the first time, the Association administered a scholarship program for youth in all of Canada’s 10 provinces and three territories. Eighty scholarships, valued at $5,000 each, and five National Entrepreneurial Scholarships valued at $10,000 each, were awarded. The five National Entrepreneurial Scholars attend the National Scholars Conference in Washington, D.C. By 2019, the 10th anniversary of the Canadian Association, the goal is to increase the annual number of scholarships awarded to 200. Soon the Horatio Alger Association of Canada will form an Alumni Association for their Scholars, which will mirror the programs and services offered to Alumni in the United States.

Through the Fairfax Financial Entrance Awards Program, sponsored by V. Prem Watsa (’12), the Association also awards 45 scholarships, valued up to $25,000 each, to students at 21 select Canadian universities.
National Career & Technical Scholarship Program

Implemented in 2016, this nationwide program, funded by Walter Scott, Jr. (’97), with matching funds from the Horatio Alger Endowment Fund, has doubled the number of scholarships awarded, from 510 to 1,020, in just two years. The program grants scholarships to youth seeking associate degrees and career technical training and certification at community colleges and career centers. Created in response to changing economic realities, where many jobs require specific skills, and the rising tuition costs at four-year institutions, this program offers students an alternative route to good jobs. This program also benefits Scholars who have discontinued their studies at four-year institutions, as they may use their remaining funds toward community college certification programs. This scholarship program is administered in affiliation with the American Association of Community Colleges and the Association of Career and Technical Education.

Dennis R. Washington Leadership Graduate Scholarship Program

National and State Scholars interested in pursuing advanced-degree studies may apply for these generous scholarships, which have been endowed in perpetuity with gifts from Phyllis and Dennis R. Washington (’95) and the Horatio Alger Endowment Fund. Recipients are awarded up to $120,000 each, and special consideration is given to students pursuing business, engineering, and entrepreneurial studies. These Scholars must also demonstrate a commitment to creating meaningful change in their chosen career fields and have a history of excellence in their previous educational endeavors. Since 2008, $5.77 million has been awarded to 90 Alumni Scholars. In 2018, the program awarded $551,000 to seven Scholars.

In 2018, interviews were conducted with finalists for the Washington Leadership Graduate Scholarships in San Diego, California, on January 15-17. Pictured in the foreground are the 2018 finalists. The back row includes Mrs. Washington (fifth from the left), Selection Committee Members, and headquarters staff.
Global Leadership Summit

From July 7 to 16, 2017, the first Global Leadership Summit (GLS) gave 30 preselected Alumni an all-expenses-paid leadership training expedition to London and Paris. Applicants to this prestigious program met the requirements of having earned a college degree and were Alumni in good standing with the Association. These Alumni have also made significant contributions as leaders in their respective communities. To demonstrate this point, Alumni were required to develop and lead a one-year project designed to serve their community.

Summit participants, who were selected from among 150 applicants, were provided with articles, books, and other assigned literature to prepare them for summit classes. Topics during the journey focused on leadership and entrepreneurship. Alumni heard from university professors, start-up company founders, business leaders, and community organizers whose experiences directly related to the projects Summit participants created. Through these discussions, Alumni learned how their projects could be modified and strengthened to be more effective.

Between now and October 2018, when the next Alumni Summit is scheduled to coincide with the Board of Directors and Membership Meeting in Washington, D.C., participants of the Global Leadership Summit will use conference calls, regional meet-ups, and social media forums to share experiences and all they learned during the international program. These follow-up activities enable GLS participants to foster the collaborative community forged in Europe in support of personal growth and the implementation of their individual projects.
Educational Services

In addition to the financial support given to Horatio Alger Scholars, the Association offers a score of services designed to assist the “whole Scholar.” This concept, developed by past Association Chairman David L. Sokol (’04), addresses the students’ needs on many levels in an attempt to make their college graduation more likely.

- **Personal Contact:** Staff members at Horatio Alger headquarters keep in regular contact with Scholars via email, phone calls, letters and cards, e-newsletters, and social media.

- **College Readiness and Scholar Support Tools:** Scholars have a personalized online account, where they can access resources to help with the scholarship disbursement process and find tips to aid in navigating through college. They also participate in surveys and webinars that offer topics such as school or major selection, study skills, grad school application process, and more.

- **HAA Conect:** Scholars can reconnect with fellow Scholars while expanding their professional network in a trusted environment.

- **Housing Needs:** The Association ensures that Scholars raised in foster care are supported during their winter and spring breaks.

- **Internships:** The Association offers Scholars meaningful internship opportunities that are supported by Horatio Alger Members’ companies. These internships provide experiences and skills that will help Scholars succeed in their careers post-college.

- **Support Services:** Through ComPsych, the Association provides 24/7 access to a special counseling hotline to assist Scholars facing emotional, personal, employment, financial, or legal obstacles. The phone number is 844-393-4977.

For many years, the Horatio Alger Association has provided Scholars with access to a 24/7 counseling and referral service for assistance with psychological and emotional needs.

The Association recently contracted with ComPsych to offer these same services along with many additional resources, including legal advice, financial counseling, and help with life issues such as housing or employment. ComPsych’s integrated consulting approach can address Scholars’ issues on many levels.
Future Alumni Event
2018 Alumni Summit, October 4–7, 2018, Washington, D.C.

This summit will overlap with the 2018 Horatio Alger Membership and Board of Directors Meeting (October 4–7), giving the two groups opportunities to interact. A special concert sponsored by the Horatio Alger Association will be held at the John F. Kennedy Center for the Performing Arts. During this event, the name of an Alumnus will be revealed as the first Scholar who will be inducted as a full Member of the Horatio Alger Association during the 2019 Awards events. Inducting a Scholar as a Member has been a long-held goal of the Association.

The Kennedy Center for the Performing Arts, Washington, D.C.

In 2004, in celebration of having granted college scholarships for 20 years, the Horatio Alger Alumni Association was established as a way to further involve college-graduated National and State Scholars in the mission and programs of the Horatio Alger Association. Alumni Summits are held periodically to set the agenda for the organization’s future. These meetings also serve as opportunities for networking and career exploration.

Steered by the Alumni Advisory Committee composed of Alumni representatives from across the United States, the Alumni Association is currently focusing on the following initiatives:

- Promoting professional networking by engaging Alumni on HAA Connect.
- Communicating with new Scholars to welcome them to the Association and to share information about available services.
- Promoting networking through “Meet-up Challenges,” in which Alumni plan gatherings in their regions.
Field Directors

Field Directors—volunteers in every state—serve as local liaisons with secondary schools and organizations in their communities to raise awareness about Horatio Alger scholarships. Many Field Directors have a background in education or experience working with youth from low-income communities. They include current or retired teachers, counselors, and administrators as well as an ever-increasing number of Horatio Alger Alumni.

The Field Directors have held two summits, with the most recent taking place in 2016 in Williamsburg, Virginia. These meetings strengthen the network that exists among Field Directors, providing opportunities to share what they are doing to inform the public about Horatio Alger scholarships. The Field Directors program is being expanded to Canada.
Online Education

The University of North Carolina at Wilmington (UNC-W) serves as a partner with the Association in providing an online course on business and entrepreneurship. Offered free of charge to Horatio Alger Scholars through the Horatio Alger Endowment Fund, this three-credit course is transferrable to the students’ home institutions. The Association is now also offering its Scholars a one-credit course focusing on personal finances at UNC-W.

Strategic Partners

The organizations below, which share in the Association’s commitment to youth, promote awareness about Horatio Alger scholarships among their constituencies.

- **American Association of Community Colleges** – advocates for nonprofit, public-serving community colleges to ensure they have the resources and support needed to deliver on the mission of increasing education and economic mobility for all.

- **America’s Promise Alliance** – founded by Association Member General Colin Powell (’91), this network of 400 partner institutions works to increase high school graduation rates and ensure that more children experience the five promises—caring adults, safe places, a healthy start, effective education, and opportunities to help others.

- **Association for Career and Technical Education** – the nation’s largest nonprofit association committed to the advancement of education that prepares youth and adults for successful careers.

- **BUILD** – through entrepreneurship-based, experiential learning, BUILD ignites the potential of youth in under-resourced communities and equips them for high school, college, and career success.

- **Central Florida Urban League** – assists Central Floridians in achieving social and economic equality. One of the cornerstones of the CFUL is our Youth Department. By working with a number of community partners, the CFUL’s Youth Department plants the seeds of responsibility, self-worth and hope into the lives of Central Florida’s youth. The CFUL nurtures more than 1,000 youth per year.

- **Childrens Aid Foundation** – is Canada’s leading national charity dedicated to improving the lives of children and youth in the child welfare system. With the support of generous corporate, foundation and individual donors, CAF has helped children since 1979 to overcome traumas of the past and rebuild stability, self-worth and a sense of life’s possibilities.

- **College Advising Corps (CAC)** – assists low-income, first-generation college and underserved high school students seeking a college degree. The CAC sponsors recent college graduates from 24 partner institutions of higher education to serve as full-time college advisers in the nation’s underserved schools.

- **The College Board** is a mission-driven not-for-profit organization that connects students to college success and opportunity. Founded in 1900, the College Board was created to expand access to higher education. Today, the membership association is made up of over 6,000 of the world’s leading educational institutions and is dedicated to promoting excellence and equity in education. Each year, the College Board helps more than seven million students prepare for a successful transition to college through programs and services in college readiness and college success — including the SAT and the Advanced Placement Program. The organization also serves the education community through research and advocacy on behalf of students, educators and schools.

- **Communities in Schools** surrounds students with a community of support, empowering them to stay in school and succeed in life. Working directly in 2,300 schools in 25 states and the District of Columbia, CIS’s school-based staff partner with teachers to identify challenges students face in class or at home and coordinate with community partners to bring outside resources inside schools. From immediate needs like food or clothing to more complex ones like counseling or emotional support, we do whatever it takes to help students succeed.

- **Cristo Rey** – a network of 25 inner-city high schools across the country that helps their students finance their education, while gaining real-world job experience, self-confidence, a strong work ethic, and awareness of relevance of their education through a Corporate Work-Study Program.
EdCan Network – Administered by the Canadian Education Association (CEA), the EdCan Network has over 125 years of experience as the leading independent national voice in Canadian K-12 education. We support over 75,000 courageous educators working tirelessly to ensure that all students discover their place, purpose and path. http://www.edcan.ca

Junior Achievement – the world’s largest organization dedicated to educating students about workforce readiness, entrepreneurship, and financial literacy through experiential, hands-on programs.

Knowledge Is Power Program – a national network of 141 free open-enrollment, college preparatory public charter schools with a track record of preparing students in underserved communities for success in college and in life. Ninety percent of KIPP students complete high school and 80 percent of KIPP alumni have gone on to college.

Leadership Enterprise for a Diverse America – a national nonprofit organization dedicated to diversifying the national leadership pipeline by enabling high-achieving students from low-income backgrounds to gain admission and to succeed at our nation’s most selective colleges.

The Learning Partnership – is a national charity dedicated to building stakeholder partnerships to support, promote and advance publicly funded education in Canada through five key deliverables—innovative student programs, executive leadership for educators, knowledge mobilization and policy, tribute celebrations of excellence and ongoing collaborations across Canada. Since 1993, more than 6.1 million students have participated in The Learning Partnership’s programs.

The National Foster Parent Association – a nonprofit organization that provides information and support to foster parents and others involved with the foster-care system through regular publications, a website, educational programs, research, and advocacy related to family-based care.

Network for Teaching Entrepreneurship, Start It Up – provides programs that inspire young people from low-income communities to stay in school, recognize business opportunities, and plan for successful futures. Its vision is that all young people can find a path to success.

Pathways to Education Canada – is helping Canadian youth in low-income communities graduate from high school and successfully transition into post-secondary education. The Pathways program provides a comprehensive set of academic, financial, and social supports to youth.

Schools That Can – the largest cross-sector network of schools in the country, working with over 145 district, charter, independent, and faith-based schools serving underserved populations. It connects leaders—from urban K-12 schools, as well as from industry, higher education, and innovative educational organizations—to share innovative and effective practices across schools, and collectively build solutions to common challenges.

Schoolhouse Connection – is a national organization working to overcome homelessness through education. We provide strategic advocacy and technical assistance in partnership with early childhood programs, schools, institutions of higher education, service providers, families, and youth. We believe education is the only permanent solution to homelessness. Our vision is that children and youth experiencing homelessness have full access to quality learning, birth through higher education, so they will never be homeless as adults, and the next generation will never be homeless.

SHAD – is a Canadian charitable non-profit organization that helps exceptional students recognize and envision their full potential as tomorrow’s leaders and change makers. Each year, the SHAD program provides the opportunity for more than 600 students from across Canada and internationally to attend a transformational month-long summer program at one of 13 Canadian host communities focused on STEM (science, technology, engineering, math).
Collegiate Partners

For more than 20 years, this consortium of 299 colleges and universities (117 public and 182 private) has shared the Association’s mission and goals to reduce the indebtedness incurred by students.

The following colleges and universities have agreed to partner with the Horatio Alger Association to maximize the non-loan aid available to Horatio Alger Scholars in order to minimize loan indebtedness and also to provide a point of contact on campus who can direct Scholars to available campus resources. For the second year, community colleges have been invited to join the Collegiate Partners Program.

Alabama
Auburn University
Samford University
University of Alabama
University of Montevallo
University of North Alabama

Arizona
Arizona State University
Embry-Riddle Aeronautical University—Prescott
Mesa Community College*
University of Arizona

Arkansas
Harding University
Henderson State University

California
Azusa Pacific University
California Institute of Technology
California Lutheran University
California State University at San Bernardino
Chapman University
Menlo College
Pepperdine University
Pitzer College
Pomona College
San Diego Miramar College*
San Joaquin Delta College*
Santa Clara University
Santa Rosa Junior College*
Scripps College
Shasta College*
Thomas Aquinas College
University of California at Davis
University of California at Los Angeles
University of California at Riverside
University of California at San Diego
University of San Francisco
University of the Pacific

Colorado
Colorado Mesa University
Colorado State University at Fort Collings
Colorado State University at Pueblo
Front Range Community College*

Connecticut
Connecticut College
Three Rivers Community College*
Wesleyan University
Yale University

Delaware
Goldey-Beacom College
Wesley College

District of Columbia
George Washington University

Florida
Florida International University
Florida State University
Indian River State College*
Nova Southeastern University
Stetson University
University of Miami
Valencia Community College*

Georgia
Berry College
Georgia Gwinnett College
Mercer University
Paine College
Savannah College of Art & Design

Hawaii
Chaminade University of Honolulu
Idaho
Boise State University
North Idaho College*
University of Idaho

Illinois
Augustana College
Bradley University
Dominican University
Illinois Wesleyan University
John A. Logan College*
MacMurray College
Quincy University
Southern Illinois University at Carbondale
Southern Illinois University at Edwardsville
St. Xavier University
University of Chicago
University of Illinois at Chicago
Wilbur Wright College*

Indiana
Depauw University
Indiana University Purdue
Indiana University—Bloomington
University of Evansville
University of Notre Dame
University of St. Francis

Iowa
Central College
Grand View University
Iowa State University
Iowa Western Community College at Council Bluffs*
Loras College
Luther College
Northwestern College: Iowa
Simpson College
University of Iowa
University of Northern Iowa

Kansas
Butler County Community College*
Wichita State University

Kentucky
Berea College
Campbellsville University
Lindsey Wilson College
University of Kentucky at Lexington
University of the Cumberlands

Louisiana
Dillard University
Loyola University New Orleans
McNeese State University
Southern University A&M College
Southern University at Shreveport
Southern University New Orleans
Sowela Technical Community College*
Tulane University New Orleans
University of Louisiana at Lafayette
Xavier University of Louisiana

Maine
Bates College
Colby College
St. Josephs College

Maryland
Howard Community College*
Loyola University—Maryland
Mount St. Mary's University
St. Johns College
Towson University
University of Maryland at College Park
Washington College

Massachusetts
Assumption College
Babson College
Boston University
Brandeis University
Bridgewater State College
Clark University
College of the Holy Cross
Harvard University—Harvard College
Regis College
Mount Holyoke College
Smith College
Stonehill College
University of Massachusetts Boston
Wheaton College
Williams College

Michigan
Alma College
Hillsdale College
Hope College
Kalamazoo College
Michigan State University
Northwood University: Michigan

Minnesota
Augsburg College
Bemidji State University
Carleton College
Mississippi
Mississippi College

Missouri
College of the Ozarks
Crowder College*
Culver-Stockton College
Drury University
Lindenwood University
Mineral Area College*
Missouri University of Science and Technology
Missouri Valley College
Rockhurst University
St. Louis University
University of Missouri at Columbia
University of Missouri at St. Louis
Washington University in St. Louis

Montana
Carroll College
Great Falls College—Montana State University*
Helena College*
Missoula College*
Montana State University at Billings
Montana State University at Bozeman
Montana State University Northern at Havre
Montana Tech at Butte
University of Montana at Missoula
University of Montana Western at Dillon

Nebraska
Bellevue University
Central Community College*
Clarkson College
College of St. Mary
Creighton University
Hastings College
Metropolitan Community College*
Nebraska Wesleyan University
University of Nebraska at Kearney
University of Nebraska at Lincoln
University of Nebraska at Omaha
University of Nebraska Medical Center

Nevada
Sierra Nevada College
Western Nevada College*

New Hampshire
University of New Hampshire

New Jersey
Caldwell College

New Mexico
Central New Mexico Community College*
New Mexico State University
St. Johns College—New Mexico
University of New Mexico
University of the Southwest

New York
Broome Community College*
Colgate University
Hobart and William Smith Colleges
Houghton College
Manhattan College
New School/Eugene Lang College
Rochester Institute of Technology
Skidmore College
SUNY College Environmental Science & Forestry
SUNY College Purchase
SUNY College Tech Canton*
SUNY Cortland
University of Rochester

North Carolina
Davidson College
Duke University
Elon University
Guilford College
High Point University
Livingstone College
Queens University of Charlotte
Shaw University
University of North Carolina at Chapel Hill

North Dakota
Bismarck State College*
Minot State University
University of Jamestown
Williston State College*

Ohio
Kenyon College
Oberlin College
Ohio Northern University
Ohio State University
Ohio Wesleyan University
Shawnee State University
University of Akron
University of Dayton
University of Rio Grande
Oklahoma
Oklahoma City University
Seminole State College*
University of Tulsa

Oregon
Lewis & Clark College
Linfield College
University of Portland

Pennsylvania
Albright College
Arcadia University
Bucknell University
Carnegie Mellon University
DeSales University
Dickinson College
Duquesne University
Gettysburg College
Harrisburg Area Community College*
King’s College
Lafayette College
Neumann College
Saint Vincent College
Washington and Jefferson College
Westmoreland County Community College*
Widener University

Puerto Rico
University of Puerto Rico at Cayey
University of Puerto Rico at Humacao

Rhode Island
Johnson & Wales University—Providence
Providence College

South Carolina
Furman University
Presbyterian College
Wofford College

Tennessee
Belmont University
Bryan College
Lincoln Memorial University
Sewanee: The University of the South
Vanderbilt University

Texas
Abilene Christian University
Lamar University
Paul Quinn College
Southern Methodist University
Stephen F. Austin State University
Tarrant County College-Northeast*
Texas A&M University
Texas Christian University
Texas State University-San Marcos
Texas Tech University
Texas Woman's University
Trinity University
University of Dallas
University of Saint Thomas Texas
University of Texas at Austin
University of Texas at Dallas
University of the Incarnate Word
West Texas A&M University

Utah
Salt Lake Community College*
Snow College*

Vermont
University of Vermont

Virginia
Ferrum College
Hollins University
Longwood University
Lynchburg College
Randolph College
Shenandoah University
University of Mary Washington
University of Richmond
Virginia Wesleyan College

Washington
Columbia Basin College*
University of Puget Sound
Whitman College

West Virginia
Davis and Elkins College
Shepherd University
University of Charleston

Wisconsin
Milwaukee School of Engineering
Ripon College
Viterbo University
Research

The Horatio Alger Association regularly conducts research projects to better understand American youth in the general population and also as a way to better understand the recipients of Horatio Alger scholarships—young people who have had significant challenges in their lives. The research data is used to support the Association’s educational mission, and serves as a credible resource for the study of resiliency and the obstacles youth face that impact their educational pursuits.

State of Our Nation’s Youth Survey

The Association conducts a survey on average every four years among American youth, ages 14–23, to learn about the people, institutions, and issues that are shaping their lives. The resulting data serves as a resource for educators, policy makers, the media, and those who are concerned about the well-being of today’s young people. To date, the Association has sponsored 12 surveys, with the last eight conducted by Peter Hart and Hart Research Associates. Dr. Gregory Wolniak, a clinical associate professor of higher education and the director of the Center for Research on Higher Education Outcomes (CRHEO) at New York University’s Steinhardt School, collaborates with Dr. Hart in compiling the results of the State of Our Nation’s Youth report.

The most recent State of Our Nation’s Youth Survey took place in 2016, the results of which were released at a press conference at the Newseum in Washington, D.C., September 13, 2016. The survey addressed topics such as trust in government, what determines success, the media, education, employment, and managing stress. Since it was a presidential election year, some of the questions focused on that subject and its impact on American youth.
Portraits of Contrast

Portraits of Contrast is a comparative study between National Scholars and American youth, based on the latest State of Our Nation’s Youth survey. Findings in the latest Portrait, published in the summer of 2017, include:

<table>
<thead>
<tr>
<th></th>
<th>National Scholars</th>
<th>High School Students</th>
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<tbody>
<tr>
<td>Hard work is the most important component for success</td>
<td>96%</td>
<td>83%</td>
</tr>
<tr>
<td>Employed part time</td>
<td>64%</td>
<td>32%</td>
</tr>
<tr>
<td>Family household structure:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mother and Father</td>
<td>23%</td>
<td>72%</td>
</tr>
<tr>
<td>Parent and Stepparent</td>
<td>6%</td>
<td>16%</td>
</tr>
<tr>
<td>Single-Parent Household</td>
<td>43%</td>
<td>24%</td>
</tr>
<tr>
<td>Mother only</td>
<td>39%</td>
<td>20%</td>
</tr>
<tr>
<td>Father only</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Non-parent household</td>
<td>34%</td>
<td>3%</td>
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<td>Family household structure:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mother and Father</td>
<td>23%</td>
<td>72%</td>
</tr>
<tr>
<td>Parent and Stepparent</td>
<td>6%</td>
<td>16%</td>
</tr>
<tr>
<td>Single-Parent Household</td>
<td>43%</td>
<td>24%</td>
</tr>
<tr>
<td>Mother only</td>
<td>39%</td>
<td>20%</td>
</tr>
<tr>
<td>Father only</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Non-parent household</td>
<td>34%</td>
<td>3%</td>
</tr>
</tbody>
</table>
Because the Association is a scholarship-granting organization that mentors its Scholars, it is important for Members and Life Partners to fully understand the current generation of youth—what has influenced their thought processes and attitudes, as well as their decisions about education and career choices. The Association’s Educational Policy and Research Advisory Committee, headed by Dr. Gregory Wolniak, Clinical Associate Professor of Higher Education and Director of the Center for Research on Higher Education Outcomes, Steinhardt School, New York University, is doing a new study to further understand the influence the Horatio Alger scholarship program has on recipients’ educational decisions and career development.

The study, which will include current and former Horatio Alger Scholars, will explore educational and career decisions—such as college major, school attendance, pursuit of graduate degrees, occupational field, earnings, and job satisfaction. A strong focus on the first year of college and its influence on student decisions will provide new insights about how the Association can best provide career and educational counseling to Scholars. The end of the study will result in a new website, which will help current, former, and even prospective Scholars looking for career and educational counseling.

**REPORT ABOUT GENERATION Z SCHOLARS:**

The Association hosted an educational panel focused on “Generation Z” youth at its 2017 Membership and Board of Directors Meeting. Interest expressed in that session led the Association to prepare the correlating report, *The Distinctive Characteristics of the Horatio Alger Association Scholars and Their “Generation Z” Peers Nationwide.*
National Visibility

The Horatio Alger Association’s national visibility campaign raises awareness about the Horatio Alger Award and the values and mission it represents. The campaign also calls attention to opportunities derived from free enterprise and the importance of helping the nation’s most deserving youth as they pursue higher education. By publicly honoring Association Members, and recognizing their inspirational life stories, the Association is encouraging one generation after the next to follow their dreams.

Public Service Announcements

The Association has distributed three broadcast PSAs featuring actor Rob Lowe, Brian Mulroney (’12), and Wayne Gretzky (’03). The PSAs have aired more than 3,800 times on 243 stations across 187 markets, including these major networks: ABC, CBS, Fox, and NBC.
The Tenors, who have given concerts throughout North America on behalf of the Association, performed at the Horatio Alger Membership and Board Meeting in Chicago in September 2017.

Horatio Alger Concert Series

Since 2006, the Horatio Alger Association has sponsored special concerts, which feature artists who serve as ambassadors of the Association (Mario Frangoulis, George Perris, Deborah Myers, and The Tenors). Information about the Association is included in concert programs, and the concerts often feature Scholar Alumni who share with the audience the positive impact of receiving a Horatio Alger scholarship.

Partnership with PBS

Horatio Alger concerts featuring Mario Frangoulis, Shelley MacArthur Farley, George Perris, Deborah Myers, and The Tenors continue to be aired on PBS stations across the country and have so far been broadcast on more than 60 percent of PBS stations nationally.

The Tenors, who have given concerts throughout North America on behalf of the Association, performed at the Horatio Alger Membership and Board Meeting in Chicago in September 2017.
Websites & Social Media

Through social media, the Horatio Alger Association shares news, press coverage, and relevant information with Members, Scholars, educational partners, and the general public. In this way, the Association increases awareness about its mission and programs. During the application period, social media is used to market the Association’s scholarship programs.

The Association’s websites—one for the United States, another for Canada, and a third for Scholars—are important tools to reach target audiences. Updated with state-of-the-art design, the sites are accessible from mobile devices. Viewers have easy access to Members’ biographies, both in written and video-streaming formats. The websites are continually updated with feature pages that promote the most current events, Member news, and Scholar stories about the positive impact the Association has had on their lives. Each site also offers the public ways in which they can make donations in support of the Association’s mission.

An important long-term visibility opportunity was realized with the dedication of the Horatio Alger Association/American Spirit Bridge at The National World War II Museum in New Orleans, Louisiana. Following the 2014 Membership and Board of Directors Meeting, hosted at the museum, Members organized an individual drive to sponsor the bridge in honor of Association Members who have served in the armed forces and loved ones who fought in World War II. We are honored to have a permanent affiliation with The National World War II Museum, which has become one of the most visited museums in the nation. Through the generosity of Members and friends, the American Spirit Bridge will proudly bear the Association’s name for all time.

Fiscal Affairs

Budget

Fiscal Years 2017 and 2018

The Horatio Alger Association ended Fiscal Year 2017 with an operating surplus of $1,565,932. Since 1989, $17,874,511 from the Operating Fund has been transferred to the Endowment Fund.

<table>
<thead>
<tr>
<th>Operating Fund</th>
<th>2017 Budget</th>
<th>2017 Actuals</th>
<th>2018 Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue</td>
<td>$30,995,522</td>
<td>$28,710,034</td>
<td>$27,668,000</td>
</tr>
<tr>
<td>Investment Revenue</td>
<td>$500,000</td>
<td>$559,897</td>
<td>$500,000</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>$31,495,522</td>
<td>$29,269,931</td>
<td>$28,168,000</td>
</tr>
<tr>
<td>Expenses</td>
<td>$29,481,883</td>
<td>$27,703,999</td>
<td>$25,239,000</td>
</tr>
<tr>
<td>Surplus</td>
<td>$1,973,639</td>
<td>$1,565,932</td>
<td>$2,929,000</td>
</tr>
</tbody>
</table>

2017 Revenue and Expenses

Fiscal Year 2018

The 2018 budget assumes a positive bottom line of $2,929,000 with 2018 Awards revenue of almost $15.4 million. Other revenue sources are Giving Clubs, support of scholarships by Members and Friends, and short-term investments in the Operating Fund.

Fiscal Year 2018

The 2018 budget assumes a positive bottom line of $2,929,000 with 2018 Awards revenue of almost $15.4 million. Other revenue sources are Giving Clubs, support of scholarships by Members and Friends, and short-term investments in the Operating Fund.
Audit

The audit for Fiscal Year 2017 was conducted by RSM US LLP, Certified Public Accountants. The report is reviewed by the Audit Committee and Chairman Anthony Welters ('98).

Anthony Welters ('98)
Horatio Alger Association Treasurer
Horatio Alger Endowment Fund Assistant Secretary
Horatio Alger Association Audit Committee Chairman

Program Budgeting

As a membership organization with a strong program in philanthropy for young people, the Association has established a track record of accountability and effectiveness in its programs and services for Members, Scholars, and Alumni. The following policies and practices have been in place for many years to safeguard the Association’s reputation as a responsible and trustworthy organization deserving of philanthropic support.

The Horatio Alger Association has long-established internal controls and monitoring procedures to ensure that it is following nonprofit best practices related to program budgeting, functional expense reporting, and a host of other financial and operational procedures. These have been in place over the past two decades, in consultation with three accredited accounting and auditing firms and annual submissions to the Internal Revenue Service.

Background

As a nonprofit membership and educational association exempt from income tax under Section 501(c)(3) of the Internal Revenue Code, the Horatio Alger Association of Distinguished Americans (the Association) is required to report its expenses under one of three functional categories: program, administrative, and fundraising. This reporting requirement is applicable to the audited financial statements as well as the IRS Form 990.

Expenses connected to a specific program or supporting service (administrative and fundraising) are directly charged to the applicable functional category, while certain other costs that benefit multiple functional categories (salaries, benefits, and occupancy, for example) are allocated amongst the programs and supporting services benefited based on a reasonable and consistently applied methodology. The program category is further subdivided into key ongoing activities of the Association, including various scholarship programs, meetings, and educational activities. Detailed descriptions of key programs are included in Note 1 of the audited financial statements. In addition, Part III of the IRS Form 990 provides qualitative and quantitative details of the Association’s program service accomplishments.
Program Expenses and Allocations

Public watch-dog groups, donors, and grantors analyze the percentage of expenditures on programs, administrative, and fundraising as one metric of an organization’s ability to accomplish its overall mission while acting as good stewards of donor funds. Benchmarks are established based upon best practices. For example, Charity Navigator provides its highest rating to organizations that report less than 15 percent of their overall expenditures as administrative and less than 10 percent of their overall expenditures as fundraising.

Charity Navigator gave the Association its highest rating (four stars). This is based upon the Association expending 5 percent and 2 percent of its total expenses on administrative and fundraising activities, respectively, and for transparency in its operations.

The Association’s percentage of expenditures devoted to providing programs is well above industry averages and positively rated by watch-dog groups. There are minor deviations in these percentages from year to year, however, the Association has exceeded 90 percent funding for programs and services each year over the past decade.

Distinguishing Financial Characteristics of Horatio Alger Association

Since its founding in 1947, the Association has been a membership organization, which ultimately developed a philanthropic focus through its educational and scholarship programs for young people. More than 70 years later, the Association remains a membership organization fully funded by its Members and Friends. The Association, unlike many nonprofit organizations, is not engaged in “cold-calling” solicitations to the general public. The Association is 100 percent funded by its Members and Friends. For example, the 2017 Horatio Alger Awards were funded by approximately 120 Members and persons directly associated with the Class of 2017. It does not seek or accept governmental funding, nor does it solicit funds from the general public. This is in sharp contrast to the majority of 501(c)(3) organizations, which receive up to 70 percent of their total revenues from governmental sources through contracts, fees for service, and grants.

Public Scrutiny

The Association remains very cognizant of the public’s interest in confirming that a significant portion of expenditures are incurred for programs. As a component of our internal controls and ongoing risk assessment process, we monitor expenditures to ensure that the focus continues to be on accomplishing program goals. Certain administrative expenses include occupancy, insurance, and certain professional fees. The Association has historically been successful in keeping these expenditures to a level that is deemed acceptable in the industry. To ensure that functional reporting and expense allocation methodologies are reasonable and consistent with industry standards, the Association uses the expertise of several organizations with significant nonprofit experience. These organizations and their related role in serving the Association are as follows:

- **RSM (formerly McGladrey)**, a certified public accounting firm, audits the annual financial statements of the Association. Robert H. Billig (Partner) heads the auditing team working with the Association.

- **TATE & TRYON**, a certified public accounting firm, whose sole focus is working with nonprofit organizations, provides consulting services to the Association related to internal controls and operational best practices. Tate & Tryon also provides the Association with benchmarking data, including a variety of financial metrics typically applicable and analyzed by nonprofits. Christian Spencer (Partner) serves as the Association’s consultant.

- **HALT, BUZAS, & POWELL, LLP (HBP)**, a certified public accounting firm, prepares the Association’s monthly financial statements and annual Form 990. HBP is also responsible for payroll, scholarship disbursements, and accounts payable. Steve Halt (Partner) oversees the Association’s account.

In addition, the Association uses a program budgeting system that is reviewed annually. The program budgeting system is used by most nonprofits. The Association’s internal control procedures include the necessary processes, reviews, and approvals to properly code and track expenditures in the appropriate functional classification. Allocation of administrative and fundraising costs to the various functional classifications are reviewed as part of the Association’s annual audit.
In May 2018, the Horatio Alger Association received a second consecutive four-star rating from Charity Navigator.

Horatio Alger Awards Induction Ceremony

In 2018, the Horatio Alger Awards Induction Ceremonies garnered support totaling more than $15.3 million, exceeding the $14.5 million revenue goal. Support for the Awards underwrites many Association programs and services. In 2018, support raised from the Awards events funded the following programs and services:

- Awards and Induction Ceremonies
- National Scholarships
- National Scholars Conference
- Educational Programs & Meetings
- Educational Media & Publications
- Alumni Programs & Services
- Administration / Operating
- Fundraising
- Research
- Collegiate Partners Program
- Field Directors Program
71ST HORATIO ALGER AWARDS SPONSORS

Eagle Flight - $250,000
Greg Abel, BHE and its subsidiaries
Bergeron Family of Companies
Chris Brown - Vestas
Dean L. Buntrock
David M. Cote
Daseke Inc.
Peter Hanlon - Gibson, Dunn & Crutcher, LLP
Murray B. Hall, Randall Dee Hubbard, Harold B. Matzner, William Stuart & George Wall
Jimmy John’s Franchise, LLC
Brad Keywell - Uptake
Patrick Lee, Hajim Family Foundation, and John and Katherine Weiland
Paul Anthony Novelty
James H. Pugh, Jr.
Matthew K. Rose
H. Lee Scott, Jr.
Walter Scott, Jr.
James M. Seneff, Jr. - CNL Financial Group
David L. Sokol
David L. Steward
Lenard B. Tessler and Robert G. Miller
Byron D. Trott
Dennis Washington
V. Prem Watsa

Liberty - $175,000
Charles C. Anderson, Sr. and The Anderson Family
George L. Argyros - Argyros Family Foundation
The Honorable Barbara Barrett and Dr. Craig Barrett
Jim and Janet Dicke
The Honorable Sam Fox
Foster Stephen Friess
Larry W. Lawson
Harvey L. Massey
Joseph Neubauer
Dr. Nido R. Qubein
Linda Rabbitt and John Whalen
Jordan Zimmerman

Patriot - $100,000
Lee R. Anderson, Sr. – APi Group, Inc.
Jon Bram and Adebayo Ogunlesi
Joseph Clark
Dino and Joan Cortopassi
Jamie B. Coulter
Marty Davis - Cambria
William J. Doré
Elaine and Ken Langone
Jack M. Gill - Gill Foundation of Texas, Terry Giles and Bernard Harris
James R. Moffett
Jan Miller and Jeffrey Rich, Charlie and Moll Anderson Foundation
Patten Family Foundation

Roger S. Penske
Renker Family Foundation
Patrick G. Ryan
Glenn B. Stearns
Chris Sullivan
Marcia Taylor
J. Ronald Terwilliger
Anthony Welters

Legacy - $75,000+
Thomas McKernan - Automotive Club of Southern California
Rollins Family
Peter W. Stott
Scott Thon - Berkshire Hathaway Energy Canada Foundation

Enterprise - $50,000+
Zachry Brown
Steven Durham
Bill Greehey
John F. Grundhofer
Keith Jaffe - Middleton Partners
The Knowlton Foundation
Gilbert E. Levassuer, Jr.
Gina Liautaud
James North
Ernest S. Rady
Harry S. Rinker
Roark Capital Group
James E. Rohr
Tom and Kathy Shannon Family Foundation
Ronald M. Simon
Patrons - Up to $50,000

The Byron and Ronnie Allumbaugh Charity Fund
Diane Anderson
Susan Ansel
Armstrong Teasdale LLP and Steven Cousins
Wanda M. Austin
Colleen C. Barrett
Donald R. Beall
Dennis Berman - Hawthorne Foundation
Frank Bisignano - First Data
Kerry Cammack
Wesley E. Cantrell
Raymond G. Chambers
Angela and Phil Chrysler
Doris K. Christopher
Ladona Clark
Virginia Clements
Delos Cosgrove
Robert L. Crandall
Todd and Carey Crossley
John H. Dasburg
Mary Dearden
John Paul DeJoria
Jerry E. Dempsey
Richard M. DeVos*
Lou Dobbs
Dave Ericks and Claudia Davant
The Fitzpatrick Foundation
Fox Restaurant Concepts
William Giroux

David Glass - Glass Family Foundation
Robert Blyth Goergen
Joseph M. Grant
J. Barry Griswold
Mark Victor Hansen
James Haslam
Mellody Hobson - The George Lucas Family Foundation
K. Michael Ingram
Alphonso R. Jackson
David Jacquin
Scott Johnson
Jerry W. Jones
James W. Keyes
Melvyn N. Klein
Edwin Levy
Dick and Mary Lou Loehr
Gregroy and Margo Lykins
Harvey Mackay
McLarty Associates
Doug McMillon
August C. Meyer
Howard M. Meyers
Lee E. Mikles
Marsha Miller
Richard and Margo Miller
Joseph Moderow
Rodrigue Mortel
Angelo R. Mozilo
Mr. and Mrs. Carlos Nieto
R. James Nicholson
David Odahowski
John Pappajohn

General Colin L. Powell
Eric J. Pulaski Philanthropic Fund
Valerie Montgomery Rice
Robert Rich - Rich Family Foundation
Jean and John Roach
Richard M. Rosenberg
Horacio Rozanski
George Brint Ryan
Sapiente Family Foundation
Robert J. Schlegel
Nancy and Philip Schmidt
Schultz Family Foundation
Katherine Scott
Harry Singer
Jim Starr
Fern F. Steinfeld
Christopher M. Stephenson
Richard and Dr. Stacie Stephenson
Bill and Carol Taylor
Anthony J Terlato
Henry B. Tippie
R. E. (Ted )Turner
Christine Church Varadi
Jeffrey B. Wampler
Frederick Wayne - Howard University
Eric Wiebe
Sidney D. Wolk
Robert L. Wright, Jr.
Michael B. Yanney
Eric Zorn

*Deceased
The Horatio Alger Association expresses sincere gratitude to T. Denny Sanford (’16) for a very generous gift to the Horatio Alger Endowment Fund. With his gift and funds from other generous donors, the Association will be able to assist more young people in perpetuity with need-based scholarships.
Legacy of Achievement

The individuals listed here have made planned gifts and bequests to the Association’s endowment fund, recognizing the importance of these gifts to the future success of our programs and activities. Through their generosity and foresight, they are ensuring that the Association will continue to help young people for generations to come. The Association is grateful for their commitment and support. The year after each name designates the Member’s induction into the Horatio Alger Association.

**Planned Gifts of $20 million or more**
- T. Denny Sanford 2016
- Dennis R. Washington 1995

**Planned Gifts of $10 million or more**
- George L. Argyros 1993
- Walter Scott, Jr. 1997

**Planned Gifts of $5 million or more**
- Leon G. Cooperman 2015
- Joseph Neubauer 1994
- Paul Anthony Novelly 2000
- David L. Sokol 2004

**Planned Gifts of $2 million or more**
- Joseph Clark 2008
- Dean A. Cortopassi 2005
- James F. Dicke II 2015
- William J. Doré 2000
- Bill Greehey 2001
- H. Wayne Huizenga* 1992
- Mike Jackson 2014
- Patrick P. Lee 2013
- Craig O. McCaw 1999
- Lee E. Mikles 2008

**Planned Gifts of $1 million or more**
- John A. Moran 2012
- John W. Rollins, Sr.* 1963
- O. Wayne Rollins* 1986
- Stephen C. Schott 2001
- Thomas Joseph Shannon, Jr. 2009
- Chris Sullivan 2007
- Henry B. Tippie 1996
- Byron D. Trott 2011
- V. Prem Watsa 2012
- Jordan Zimmerman 2015
- Byron Allumbaugh* 1996
- Lee R. Anderson, Sr. 2014
- Al Annexstad 2010
- Barbara Barrett 1999
- Donald R. Beall 1998
- Kenneth E. Behring 2006
- Herbert F. Boeckmann, II 1995
- Jack H. Brown* 1992
- Dean L. Buntrock 1996

*Deceased
Doris K. Christopher 2006
James L. Clayton, Sr. 1991
Richard K. Davidson 2002
Richard H. Driehaus 2013
Charles W. Durham* 2002
William F. Farley 1986
Sam Fox 2005
Terry M. Giles 1994
Jack M. Gill 1999
John F. Grundhofer 1997
Craig Hall 2007
Bruce T. Halle* 2015
Thomas L. Harken* 1992
Randall Dee Hubbard 2014
Delores M. Kesler 1998
Melvyn N. Klein 1996
Richard L. Knowlton 1992
Gilbert Edward LeVasseur, Jr. 2015
Alan B. Miller 2010
Robert G. Miller 2012
James R. Moffett 1990
Jim Moran* 1996
John Pappajohn 1995
Harry S. Patten 2011
James A. Patterson 2002
T. Boone Pickens 2006
Carl R. Pohlad* 1989
Greg P. Renker 2012
Harry S. Rinker 2003
Joseph E. Robert, Jr.* 2005
Matthew K. Rose 2013
James M. Seneff, Jr. 2010
Ronald M. Simon 2005
Earl W. Stafford, Sr. 2010
Glenn B. Stearns 2011
Ronald C. Waranch* 2003
John H. Weiland 2012
Anthony Welters 1998
David W. Wilson 2005

**Donors of up to $1 million**

Campus Crest
Charles C. Anderson, Sr. 2015
Robert H. Dedman* 1989
Eugene Fitts
Michael Keebler Giroux
Serge Godin 2015

Ebby Halliday* 2005
Kenneth G. Langone 2012
Michael G. Morris 2009
Angelo R. Mozilo 2004
Jim Pattison 2004
Marvin A. Pomerantz* 2001
Frank E. Resnik* 1988
Charles R. Scott* 1984
Delford M. Smith* 2002
Jack D. Sparks* 1985
David L. Steward 2014
Monroe E. Trout 1995
Venita VanCaspel Harris* 1982
Rick Waugh 2011
Sidney D. Wolk 1999

*Deceased
**Donors $100,000 or less**

- J. Russell Flowers* 2013
- Joseph Gildenorn
- George L. Graziadio, Jr.*
- Alan C. Greenberg* 1997
- J. Ira Harris 1977
- Ralph A. Hart* 1994
- Paul Harvey* 1983
- Richard D. Holland* 2010
- Robert J. Hudiburg
- Henry A. Johnson* 1985
- Dee J. Kelly* 1995
- Jack LaLanne* 1979
- Sherry Lansing 2004
- Jeff Longstreth
- Rebecca MacDonald 2009
- Bonnie McElveen-Hunter 2013
- Ed McMahon* 1984
- Sanjeev Mehra
- Kevin Mitchell
- Gordon E. Moore 1996
- R. James Nicholson 2000
- Indra K. Nooyi 2009
- John C. Portman, Jr.* 1990
- Linda D. Rabbitt 2016
- John Reed
- Virginia Renker
- John V. Roach 1990
- Josue Robles, Jr. 2011
- Virginia M. Rometty 2016
- Richard M. Rosenberg 2007
- Larry Ruvo 2013
- William G. Salatich* 1975
- Lee R. Sollenbarger* 1980
- Joseph Solomon* 1978
- Manfred Steinfeld 1981
- Peter W. Stott 2014
- Mary Jo H. Timmons
- Harold Toppel* 1966
- R.E. Turner 1997

*Deceased
Giving Clubs

Members, Life Partners, and Friends support the Association’s scholarships through participation in the Association’s Giving Clubs. This financial support funds Association scholarships and educational programs and services for Scholars.

- President’s Club: $100,000 per year for five years ($500,000)
- Founder’s Club: $20,000 per year for five years ($100,000)
- Chairman’s Club: $10,000 per year for five years ($50,000)

Currently, there are 9 Members of the President’s Club, 14 Members of the Founder’s Club, and 18 Members of the Chairman’s Club.

**President’s Club**

Harold Hamm 2016
Jeong H. Kim 2016
James J. Maguire, Sr. 2015
James R. Moffett 1990
Joseph Neubauer 1994
Clarence Otis, Jr. 2007
John H. Scully 2017
Earl W. Stafford, Sr. 2010
Henry B. Tippie 1996
Dennis R. Washington 1995

**Founder’s Club**

Barbara Barrett 1999
Michael Bloomberg 2011
James F. Dicke II 2015
Bill Greehey 2001

**Chairman’s Club**

Byron Allumbaugh* 1996
Doris K. Christopher 2006
Richard K. Davidson 2002
John Paul DeJoria 2004

**Non Members**

Virginia Clements
Milos Raonic
STATE SCHOLARSHIPS

National Scholarships in the United States are supported by the Horatio Alger Association and the Horatio Alger Endowment Fund with contributions to the Endowment Fund, Awards support, and Giving Club commitments. While some State Scholarships are also funded by the Association and the Endowment Fund, many are administered with contributions from individuals and organizations. The Association is proud and grateful to award State Scholarships with generous support from the sponsors listed below.

Alabama
Charles C. Anderson, Sr.

Arizona
James R. Moffett

California
Julia and George Argyros
Donald R. Beall
Angelo R. Mozilo
Paul Anthony Novelty
Ernest S. Rady
Richard M. Rosenberg
Ronald C. Waranch*
  Foundation

Colorado
Philip Anschutz
James R. Moffett
Michael Shannon

Delaware
In Honor of John W. Rollins, Sr.

District of Columbia / Maryland / Virginia
Anthony Welters

Florida
Estate of Dorothy Girard
Edyth Bush Charitable Foundation (Odahowski)
Robert Blyth Goergen
Clarence Otis, Jr.
Chris Sullivan

Georgia
O. Wayne Rollins* Foundation

Idaho
Robert G. Miller

Illinois
Brinson Foundation
Dean L. Buntrock
Doris K. Christopher
Brad Keywell - Uptake
Patrick G. Ryan

Iowa
Chris Brown - Vestas

Kentucky
Lift a Life Foundation
  (David C. Novak)
James A. Patterson

Louisiana
James R. Moffett
Clayton Paul Hilliard

Maine
Francis Nichols

Massachusetts
Harry Patten
Sidney D. Wolk

Minnesota
Al and Cathy Annexstad
Horatio Alger Scholarship Fund

Missouri
Paul Anthony Novelty

*Deceased
Montana
Phyllis and Dennis Washington

Nebraska & Western Iowa
AKSARBEN Foundation

Nevada
Stephen A. Wynn

New Jersey
John H. Weiland - C.R. Bard, Inc.

New Mexico
R.D. Hubbard
James R. Moffett

New York
Edmund A. Hajim
Peter Hanlon - Gibson Dunn & Crutcher LLP
Byron Pitts
Lenard Tessler

North Dakota
BNSF Railway Foundation

Ohio
James F. Dicke II (Crown Equipment Corporation)
Ronald G. Harrington

Oklahoma
Reba McEntire

Oregon
Chris Brown - Vestas
Peter W. Stott

Pennsylvania
Alan B. Miller
Neubauer Family Foundation

South Dakota
Dean Buntrock
T. Denny Sanford

Tennessee
Jim Clayton
James A. Haslam II
Reba McEntire

Texas
Terry M. Giles
Bill Greehey
Ebby Halliday Scholarship Fund
Larry W. Lawson
George Mitchell
Ronald C. Waranch* Foundation
Kelcy Warren

Vermont
Francis Nichols

Washington
Joseph Clark

*Deceased

The following State Scholarship Programs are being funded by the Horatio Alger Association of Distinguished Americans and/or the Horatio Alger Endowment Fund:

Alaska
Arkansas
Connecticut
Hawaii
Indiana
Kansas
Michigan
New Hampshire
North Carolina
Rhode Island
South Carolina
Utah
West Virginia
Wisconsin
Wyoming
SPECIALIZED SCHOLARSHIPS

As a service to its Members, Friends, and students, the Association administers specialized scholarships based on parameters determined by the program sponsor. The criteria may focus on students attending designated schools, studying specific curricula, or hailing from a specific region. However all of these programs include the criteria of assisting students who have faced adversity and economic hardships. The Association is honored to be able to help students and to participate in the philanthropy of the individuals and organizations listed below.

**Annette Turner and Gladys Rice Scholarship**
Valerie Montgomery Rice

**Boise State University**
Robert G. Miller

**Dennis R. Washington Leadership**
Dennis & Phyllis Washington

**Helen B. Miller**
Dennis & Phyllis Washington

**Honeywell**
Honeywell (David M. Cote)

**Hormel Foundation**
The Hormel Foundation
(Richard L. Knowlton)

**Joe Robert Scholarship**
In Honor of Joseph E. Robert, Jr.*

**John Hardin Hudiburg-Texas**
Robert J. Hudiburg

**Idaho State University**
Robert G. Miller

**Leaders for Tomorrow**
Al and Cathy Annexstad
Horatio Alger Scholarship Fund

**Making Waves Foundation**
Carlyse and Arthur Ciocca Charitable Foundation
John H. Scully

**Mark & Mary Davis**
Mark & Mary Davis

**Melvyn N. Klein**
Melvyn N. Klein

**National Career and Technical Education**
Roger S. Penske
Suzanne and Walter Scott Foundation

**Notre Dame Scholarships**
Al and Cathy Annexstad

**Ohio Career and Technical Education**
Janet and James F. Dicke II
Mary Wilson, in honor of Janet and James F. Dicke II

**Oklahoma Career and Technical Education**
Reba McEntire

**Pepperdine**
George Graziaidio, Jr.*

**Santa Clara-Schott Family**
Stephen C. Schott

**Tennessee Career and Technical Education**
Reba McEntire

**Texas-Fort Worth**
BNSF Railway Foundation

**Trott Family**
Byron D. Trott

**William J. Doré**
William J. Doré

CANADIAN SCHOLARSHIPS

With support from the Board of Directors of the Horatio Alger Association of Canada and the noted American sponsors, the Association is proud to administer a scholarship program for students all across Canada. Eighty-five scholarships are currently being awarded through the National Entrepreneurial Scholarship Program, with the goal of awarding 200 scholarships by the Canadian Association’s 10th anniversary in 2019. We are also grateful to Horatio Alger Association of Canada President V. Prem Watsa (’12) and his colleagues at Fairfax Financial Holdings for allowing the Association to administer its corporate scholarship program that assists 45 deserving students each year.

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FUTURE EVENTS
FOR ALL MEMBERS, LIFE PARTNERS, AND FRIENDS

2018 MEMBERSHIP AND BOARD OF DIRECTORS MEETING 2018 ALUMNI SUMMIT — AN EVENING OF ACHIEVEMENT AT THE JOHN F. KENNEDY CENTER FOR THE PERFORMING ARTS
October 4-7, 2018 | The Ritz-Carlton Hotel
Washington, District of Columbia

Hosted by the Board of Directors of the Horatio Alger Association of Distinguished Americans

The 2018 Membership and Board of Directors Meeting will be held concurrently with the 2018 Alumni Scholars Summit in Washington, D.C. This will allow Members, Life Partners, and Friends to meet many of the Alumni Scholars whom they have assisted over the past 34 years. For participants at both meetings, there will be a special Evening of Achievement (dinner and program with entertainment) at the John F. Kennedy Center for the Performing Arts. At this event, the Association will announce the name of the first Alumnus who will be inducted as a full Member during the 2019 Awards events. We hope you will plan to be with us for this historical and uplifting event.

2018 HORATIO ALGER ASSOCIATION OF CANADA BOARD OF DIRECTORS MEETING AND EXCELLENCE GALA
October 30, 2018 | Royal York Hotel
Toronto, Canada

The Horatio Alger Association of Canada will host its annual Board meeting and the second Excellence Gala on October 30. The first Excellence Gala raised considerable funds in support of Horatio Alger scholarships for young Canadians. The event also provides an excellent opportunity to salute the individual selected to receive the International Horatio Alger Award the following year. The Excellence Gala is the Canadian Association’s signature event, similar to the annual Awards Induction Ceremony in the United States.
72ND ANNUAL HORATIO ALGER AWARDS
April 4–6, 2019  |  The Ritz-Carlton  |  Washington, District of Columbia

The Association will continue to carry out its proud traditions during the 72nd Horatio Alger Awards Induction Ceremonies on April 4–6, 2019. We hope all Members, Life Partners, and Friends will be with us to welcome the newest class of distinguished Members and our National Scholars from the United States and Canada.

2019 INTERNATIONAL MEMBERSHIP AND BOARD OF DIRECTORS MEETING
October 2–4, 2019  |  The Ritz-Carlton  |  Montreal, Quebec, Canada

Hosted jointly by the Boards of Directors of the Horatio Alger Association of Distinguished Americans and the Horatio Alger Association of Canada

2019 marks the 10th anniversary of the Horatio Alger Association of Canada. To further increase the already considerable esprit de corps between Members from Canada and the United States, all Members, Life Partners, and Friends are invited to participate in the 2019 Membership and Board of Directors Meeting, which will be hosted in Montreal. The occasion will be a time of celebration and good fellowship among participants from both countries.

73RD ANNUAL HORATIO ALGER AWARDS
April 2–4, 2020  |  The Ritz-Carlton  |  Washington, District of Columbia

While the events during the annual Awards Induction Ceremonies remain the same, great effort is expended in making each year’s events enjoyable and memorable in their own right. Each new class of Members adds to the strength of the Association and each new group of Scholars further extends awareness about its mission and opportunities that are available through the free-enterprise system. We hope all Members, Life Partners, and Friends will join in our celebration of the 73rd Horatio Alger Awards Induction Ceremonies.

2020 MEMBERSHIP AND BOARD OF DIRECTORS MEETING
September 2020  |  San Diego, California

Plans are underway to host the 2020 Membership and Board of Directors Meeting in sunny San Diego, California. All Members, Life Partners, and Friends are encouraged to attend what promises to be a productive, yet relaxed, series of events as the Association continues to steer a course toward its 75th anniversary in 2022. More information about the 2020 meeting will be forthcoming.