

SEVEN PEARLS
FOUNDATION, INC.



STAGE^r TWO
**STRATEGIC
ACTION PLAN**

“A Future of Endless Possibilities”

Revised April 2, 2025

984-228-8058
1000 Southhill Drive
Cary, NC 27513
sevenpearls.org

THE SEVEN PEARLS FOUNDATION, INCORPORATED



Dear Supporters,

In my mind echoes the words of Maya Angelou's poem, Still I Rise.

Thank you for the support you have given to the Seven Pearls Foundation, Incorporated, that has allowed it to reach the 20th year of its founding. I am humbled to have been selected to provide the leadership for a Foundation that is positioned to provide services as well as support for community service projects.

Having met its obligation of purchasing and maintaining the headquarters property at 1000 Southhill Drive, Cary, North Carolina, the Foundation is prepared to move into the second phase of operation, which is the community service component. The operation of this segment will allow us to do phenomenal things for and through the organization that places such great value on service to our communities.

We are pleased with what has been accomplished by the Foundation. Of course, we did not do these feats by ourselves. We are thankful for the support of our many supporters and especially the major support of the Life Members of the sorority. Their response to our call has been tremendous and impactful.

Our current theme: "A Future of Endless Possibilities" indicates how excited we are about moving into the second stage of operations which will allow us to be responsive to the needs of the communities in which we live and serve. As we move forward, we will:

- Gain greater understanding of the needs of those in underserved and under representative communities
- Identify opportunities for growth in securing funds for facilitating planned activities
- Ensure that Foundation initiatives are relevant and focus on ensuring a positive community service experience
- Develop strong relationships with community stakeholders
- Identify well prepared individuals to be a part of the Foundation's leadership team
- Develop solid relationships with those available for partnering and funding sources

The Seven Pearls Board of Directors is comprised of Life Members and Cultured Pearls dedicated to the perseverance of the organization while upholding the standards established by the Founders. The property is mortgage free, and it is this accomplishment we wish to celebrate with you.

The Seven Pearls Foundation will continue to serve as an advocate and supporter of programs and activities that provide positive educational, economic, and social transformation to the communities we serve, particularly the underserved and underrepresented.

In Service,
Linette Caroselli
President/CEO

THE EVOLUTION OF THE SEVEN PEARLS FOUNDATION, INC.



The Seven Pearls Foundation, Inc. (named for the Seven of '1922') is a registered 501(c)(3) non-profit corporation founded in 2004 as a philanthropic arm of the sorority. It remains dedicated to the continuing vision of the sorority's Founders and the focal point of those who brought it into existence as the forward movement continues. It serves as a large-scale force that helps to impact leading social and systemic changes that are needed to improve the lives and productivity of those in the communities we serve. The Foundation from its inception has been wholeheartedly invested in our sisterhood and it believes deeply in our philanthropic mission, vision, and core. There is a quiet strength that comes from the desire to remain true and constant to the organization that established us, the Sisterhood, the opportunities for service, and the values we hold dear. The aim of the Foundation is to advance women and youth to be an organization whose shared vision truly inspires action and impacts the lives of its supporters and those we serve.

There have been significant changes to the social, cultural, economic, and educational needs of the communities of America, particularly for those in dire need since the establishment of the Seven Pearls Foundation. These shifts in the landscape have caused a need for an increase in the funding, resources, and services given by philanthropic and non-profit benefactors for programs and initiatives that confront the challenges in underserved and under-resourced communities. These must include an increased focus on those initiatives that create positive life, educational, and professional outcomes for people of color. Addressing these 21st century social challenges require philanthropic entities of all sizes and cultural orientation to take greater leadership responsibilities in reducing the negative social impact to the communities they serve. The Seven Pearls Foundation, in recognition of this new age of philanthropic responsibility, delineates the way it will address the challenges facing the membership and the communities they serve as a part of its strategic action plan.

The Seven Pearls Foundation's Second Phase

The Seven Pearls Foundation, Inc. moves to its second operational component by continuing to chart a course of action to ensure that it becomes a leading non-profit organization that provides support to other organizations and the communities we serve. The theme for this phase is, "A Future of Endless Possibilities."

The Foundation was organized as a philanthropic arm of Sigma. The Sorority was founded in 1922 at Butler University in Indianapolis, Indiana. Providing greater service thus brings greater progress providing the framework for the Foundation's programs and activities.

The Foundation was established as a non-profit, tax exempt, publicly supported organization as described in Section 501© (3) of the Internal Revenue Code. Having met its stated obligation of purchasing and maintaining the Headquarters property at 1000 Southhill Drive, Cary, North Carolina, the Foundation is prepared to move into the second phase of operations, which is the community service component. The Foundation's purposes for this stage are to manage the Headquarters property and provide community service activities with emphasis on underserved and underrepresented communities. It also includes initiatives for continuing the quest for education at any age. More emphasis will be placed on the charitable services as envisioned by our Founders. This revision provides the guidelines for the programmatic change.

Mission Statement

Our mission is to reinforce the legacy of the seven visionary educators, known as the Seven of '1922' through activities and initiatives that promote education, leadership, sisterhood, and community impact.

Core Ideals

The Foundation embodies and embraces three ideals that are woven into its basic principles and commitments to service.

1. EMPOWERMENT- We affirm our commitment to assist in instilling skills necessary to assist the organization and individuals in finding the best that is within them and ways to utilize it effectively leading to increased confidence, more self-esteem, and better mental health. This creates a pipeline of successful ladies and change agents who are intentional about making themselves and their communities better places for all with earned power.
2. LEADERSHIP- The Foundation emphasizes leadership by prioritizing leadership skills, self-awareness, and exposure to diverse leadership opportunities for women of all ages and educational backgrounds. This learning will infuse with their educational experiences to produce ladies positioned for potential leadership roles at all levels in Sigma Gamma Rho Sorority, Inc., various other organizations, and on their college campuses and communities.
3. REPRESENTATION -The Foundation's goals reflect a broad commitment to advocating for and supporting the interests, aspirations, and advancement of underrepresented Black girls and women, including their introduction, participation, and success in certain careers where they may face unique challenges and barriers.

The future of the Foundation is guided by the aforementioned principles, which encompasses the following seven core values:

1. Perpetuating our heritage while committing to organizational growth
2. Fostering enduring sisterhood, friendship, and service
3. Promoting personal growth and development for constituents
4. Advancing intellectual and professional progression for those we serve
5. Supporting undergraduate and youth education, health stability, and advancement
6. Providing sustained service to the wider community
7. Promoting ethical behavior, respect, authenticity, integrity, and the aspiration to excellence in all we do.

The Foundation believes in and will:

- Facilitate programs that provide positive impact on the educational, leadership, community service arenas, and other charitable purposes of the group
- Invest in the wider community by instilling skills necessary to navigate life in the young people, to inspire members to greater service, and to invest in the lives of others in our community service areas.
- Celebrate the arts as an essential tool for personal growth, community engagement, and cultural expression, ensuring that creative forms of self-expression are integrated into our programs to empower individuals and connect diverse communities.
- Enable the membership to excel so they can help others to achieve.
- Vision Statement
- Our vision is a world where every individual has access to a quality education, health services that address both their physical and mental well-being, and opportunity—empowering them to excel and help others achieve their greatness.

Strategic Direction

The Seven Pearls Foundation, Inc. was founded to help the organization expand its structural capacity to intentionally connect and augment services to assist in the development of the individuals and communities that are underrepresented and underserved. The need was identified for a philanthropic arm that could provide a variety of services. It is the goal of the Seven Pearls Foundation to become one of the leading philanthropic entities and be at the forefront of bringing about educational, social, and economic empowerment. Particular attention will be given to the collegiate segments and youth. One of the Foundation's fundamental premises is that a world which invests in the young will realize the power of their ability to achieve in all fields of human endeavor as they become leaders of social change for the greater good of our communities and the world.

1. The Seven Pearls Foundation shall assume the role of one of the leaders of seeking solutions to negative issues confronting education, youth, leadership development and opportunities, and economic advancement for the underserved.

a. Identify key challenges to undergraduates and youth as it pertains to educational advancement and life outcomes in underserved and underrepresented communities.

b. Identify like-minded organizations that focus on similar or related issues for partnerships, research, grant acquisition, and conferences.

c. Facilitate and /or take part in convenings among the professional researchers and practitioners in the educational, youth, and community development and improvement arenas to learn and facilitate best practices for programs supported by the Seven Pearls Foundation to influence dialogue around the issues.

2. The Seven Pearls Foundation will seek a diversity of funding sources to assist with the development of promising programs and initiatives that have the potential for improving educational and life outcomes for underrepresented, under-sourced, and underserved communities.

a. Hire a person responsible for locating funding sources and developing proposals for submission for possible funding.

b. Develop internal proposal writing and reading teams to ensure that the Foundation has the resources to apply for identified funding sources.

c. Provide support for grantees through program evaluation, coaching, and advisement to ensure that programs realize their intended and desired impact.

d. Use developed program evaluation instruments to determine if the expected outcomes are being achieved.

3. The Seven Pearls Foundation will focus on exponential growing its services by engaging the members of the sorority, the philanthropic sector, and corporate America as part of its fund development and human resources plan.

a. Enhance the Foundation's internal infrastructure processes, and capabilities to effectively manage programs, initiatives, and resources.

b. Increase the Foundation's financial stability by diversifying funding sources, securing grants, sponsorships, and donations, and cultivating strategic partnerships with stakeholders and supporters.

c. Expand the national branding and elevate the Foundation's visibility and reach within the community and beyond by effectively communicating its mission, impact and value proposition to stakeholders, potential donors, and supporters.

d. Provide a platform for supporters and community members to utilize their professional experience to support the capacity building of community-based programs and initiatives.

4. The Seven Pearls Foundation will invest in the development of its operational infrastructure and philanthropic practices to become more effective, efficient, and responsive in meeting the needs of its community, program providers, and the marketplace.

a. Hire full-time Grants and Program manager.

b. Continuing to provide quarterly financial records for transparency and clear articulation of where all revenue received or earned by the Foundation is located or allocated.

- c.** Improve Board Governance through Board reorganization and Board training to ensure compliance with IRS rules and protocols for non-profits and to stay current with changes in the philanthropic /nonprofit landscape.
- d.** Provide first-class customer service and response to donors through our dedicated staff.
- e.** Develop marketing documents and communication profile to continue to raise the image of the Seven Pearls Foundation.
- f.** Continuously assess and evaluate the effectiveness and impact of the Foundation's programs and initiatives and adapt strategies and approaches as needed to ensure alignment with organizational goals and objectives.

The Advisory Committee

An Advisory Committee will be appointed to assist the Foundation in understanding the experiences and meeting the needs of individuals, organizations and communities. This Committee will be composed of individuals who will bring needed skills to the Foundation.

The Advisory Committee will:

1. Identify opportunities for growth in the ability to secure needed funds for facilitating planned activities.
2. Develop strong relationships with community stakeholders.
3. Ensure that Foundation initiatives are relevant and focused on ensuring positive membership experiences and community service endeavors that meet stated needs.
4. Assist in the identification and contact with significant funding sources and partnerships and writing proposals for funding.
5. Provide help in identifying well-prepared individuals whose skills meet identified needs to be a part of the Foundation's leadership.
6. Identify possible legal problems and provide safeguards to ensure that all legal guidelines are followed.

Educational and Program initiatives

- Scholarships/Fellowships
- National and Regional Leadership Development Opportunities
- Program Grants
- Chapter Grants
- Speakers at Conferences
- HBCU Initiatives
- Women and Children's Health Projects
- Community Service Activities
- Maintenance of Headquarters Office

Staffing

1. Current Executive Assistant
2. One paid employee to maintain the funding portion of the program by identifying sources of funding, making initial contacts when needed, assisting proposal writers and readers, accounting for funds, and other assigned responsibilities.

Volunteers

Proposal Writing Team
Proposal Reading Team
Program Development Assistants
Undergraduate Mentors

Target Audiences

Historically Black Colleges and Universities (HBCUs)
Underdeveloped communities
Undergraduates
Educational and Leadership Programs
Women and Children's Health Research and Services
Collegiate Leadership Programs
Global Issues

Revenue Sources

Individual Donations
Government Grants
Organization Grants
Programs and Activities
General Public Donations
Corporate Grants
Life Member Support Group
Other, as identified

The Seven Pearls Foundation is in a position to play a crucial role in ensuring the successful implementation and sustainability of the Foundation's programs and initiatives.

Integrity Statement

The Seven Pearls Foundation recognizes that philanthropy is based on volunteer action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that the Foundation merits the respect and trust of the public, and that donors and prospective donors can have full confidence in its operations the Foundation pledges to have transparent and open operations and communication as is allowed by the laws and policies governing 501(c)(3) organizations. It further declares integrity as a major element in all Foundation processes.

Appendices



Appendix 1: The Seven Pearls Foundation, Inc. Organizational Structure

The Seven Pearls Foundation Board of Directors

President

Officers

Regional Representatives**

Committee Chairpersons

Executive Assistant ***

Foundation Committees*

Corporate Advisory Board

Fund Development

Proposals, Grants, and Awards

Corporate Giving

Foundation Supporting Partners

Initiatives Committee

Ex-Officio Members:

Mrs. Helen J. Owens, Founding Grand Basileus

Dr. Mynora J. Bryant, President Emerita

Mrs. Christine E. Trigg, Founding President*

Support

Technical & Public Relations Coordinator**

Director of Initiatives***

Director of Creativity & Engagement**

Multimedia Content Producer***

(Deceased)*

Appointed **

Professional Staff ***

Appendix 2: The Establishment of The Seven Pearls Foundation, Inc.

The illustrious founders of Sigma Gamma Rho Sorority, Inc. had a bold vision for the sisterhood, grounded in the resources and opportunities available at that time. As they navigated uncharted waters and embarked on their pioneering journey, they relied on their homes and local accommodations to conduct meetings and manage the organization's affairs.

As the sisterhood flourished, and opportunities for organizations of color grew, it became clear that the Sorority needed a dedicated framework to house its operations and preserve its historical materials. While hotels and venues provided temporary solutions for special events, the growing need for consistent operational space became undeniable. Recognizing this necessity, the decision was made to establish the first official Headquarters at 403 Wilshire St., Park Forest, IL.

As the organization expanded, so did the need for a larger and more professional infrastructure to support its development. In 1971, Grand Basileus Annie Lawrence Brown led the purchase of property at 7311 S. Yates Blvd., Chicago, IL, which was later sold after a few years of occupancy due to space limitations. In 1988, Dr. Rejesta V. Perry, Grand Basileus, spearheaded the relocation of operations to 8800 S. Stony Island Blvd., Chicago, IL, providing ample space for growth and income-generating opportunities. Grand Basileus Katie K. White's Capital Campaign successfully paid off the mortgage, and Soror Adah Hull's leadership of the Headquarters Building Fund Committee laid much of the groundwork for the Sorority's continued success.

As the organization expanded further, it became evident that the Stony Island property no longer met its evolving needs. Acknowledging the importance of securing a more suitable space, Dr. LaRona J. Morris, the 19th Grand Basileus, established the Headquarters Committee to explore relocation options. Although the transition was not completed during her term, the foundation laid under her leadership was carried forward by 20th Grand Basileus Helen J. Owens. Under the leadership of Grand Basileus Owens, the Headquarters Committee conducted a thorough review of numerous locations in several states and gathered input from chapters and members to guide the process. After careful consideration, the Committee recommended the property at 1000 Southhill Drive, Cary, North Carolina.

Recognizing the importance of separating the Sorority's assets from operational responsibilities, and upon the advice of Legal Counsel, the Seven Pearls Foundation, a 501(c)(3) organization, was established. Named in honor of the Sorority's seven founders, the Foundation was tasked with managing all aspects of the new property's operations and funding. The Grand Body voted to approve both the use of the Cary property as the new headquarters and the establishment of the Seven Pearls Foundation at the 2004 Boule in Memphis, TN. These votes facilitated the creation of a dedicated structure to support both the Foundation's and the Sorority's future growth and success. Before leaving office, Grand Basileus Owens secured funding for the new facility. Soror Christine Triggs served as the first President of the Seven Pearls Foundation. From 2005, this property served as the headquarters for both Sigma Gamma Rho Sorority, Inc. and the Seven Pearls Foundation, becoming a central hub for administrative functions and historical preservation.

Appendix 3: Major Projects and Services

A. Completion of the Headquarters Relocation Project

The Seven Pearls Foundation has successfully completed a transformative project that marks a key milestone in the history and legacy of Sigma. This project involved relocating the Sorority's headquarters, a long-term vision realized through careful planning, leadership, and collaboration across multiple generations of Sorority members.

The project began under the leadership of Dr. LaRona J. Morris, the 19th Grand Basileus, who established the Headquarters Committee to explore a new location. Although the transition was not completed during her term, the momentum was carried forward by 20th Grand Basileus Helen J. Owens. The Committee gathered input from chapters and members to assess organizational needs such as operational space, income-generating opportunities, accessibility, and potential for future growth. After careful consideration, they decided on the 200 Southhill Drive location in Cary, North Carolina and The Grand Body voted to approve the relocation to the new property at the 2004 Boule in Memphis TN.

Under the leadership of Dr. Mynora J. Bryant, the 21st Grand Basileus, the relocation was successfully completed, and the new headquarters began operations in 2005. Dr. Bryant oversaw the selection of staff, the procurement of furnishings, and the smooth transition of Sorority operations to the new facility. This building serves as the headquarters for both Sigma and the Seven Pearls Foundation, becoming a central hub for administrative functions and historical preservation. The successful completion of this relocation stands as a significant achievement, ensuring the continued success and growth of both the Sorority and the Foundation, while preserving the rich history of the organization's founding and development. This project is a testament to the vision, dedication, and leadership of the Sorority's members and their ongoing commitment to its mission of service, empowerment, and community impact.

B. Leasing Space in Headquarters Property

The Foundation leases office space at its headquarters to generate sustainable revenue, fund its programs, and offer high-quality office spaces to organizations aligned with its mission. Located in a prime area of Cary, NC, the property features modern amenities and easy access to major transportation routes. With the success of this leasing initiative, the Foundation is positioned for continued growth and sustainability. The income generated from leasing activities supports ongoing operational costs and community-driven programs.

C. Tenant Support Services

The Foundation provides a range of tenant support services to assist tenants with their operations. These services included logistical support for events, access to administrative resources, and guidance on building-related issues. The Foundation's leadership team maintains an open-door policy, encouraging tenants to approach them for assistance with any operational and programmatic needs.

D. Fundraising

The Foundation sponsored Life Member Luncheons at regional and international conferences, open only to sorority Life Members in recognition of their financial contributions and service to the Sorority. They were well attended and created a sense of belonging to the attendees.

Other fundraising events (galas) were conducted to support sorority programs and projects, and bring awareness to causes important to the Black community such as heart health, stroke, and breast cancer awareness.

Moreover, the Foundation makes it possible for members and donors to have their names and other sentiments displayed at the headquarters building on a donor tree and offices.

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