

**UNITED METHODIST FOUNDATION OF SANTA ROSA**  
**September 14, 2019**

***Name of Commission/Committee/Group:*** The United Methodist Foundation of Santa Rosa

***Members of the Commission/Committee/Group:*** *[chair, members, staff]*

Paul O'Rear, President	Lynne Garrison
Marty Wait, Treasurer	Michael Welch
Joyce Milks, Secretary	Jim Wieschendorff, Past President
Steve Zwick, Investment Director	Kim Corcoran
Charlene Simons	Lori Sawdon, Senior Pastor

***Meetings are held (when, where):***

Quarterly usually on the third Tuesday of the Months of February, April, August and November, at 5:30 in the McMullin Room.

***Purpose of the Commission/Committee/Group:*** *(If your group relates to one of the six areas of SHIFT, note that.)*

The United Methodist Foundation of Santa Rosa serves Jesus Christ by supporting the long-term funding and investment needs of the First United Methodist Church's church-related institutions and ministries and by educating, encouraging, and enabling individuals to carry out Christian philanthropy.

The United Methodist Foundation of Santa Rosa is a permanent fund, established and maintained by contributions for charitable and religious purposes that support the activities of the First United Methodist Church of Santa Rosa.

***How does the purpose help fulfill the mission of FUMC?***

The Foundation supports ministries and programs which are not part of the annual operating budget of the church. Gifts and donations are received and are invested with a historic return of approximately 7-8 %. Each year approximately 4% of the investment returns are spent on grants which fit the purpose of the Foundation. Because the invested funds are permanent, they will continue to grow, meaning the Foundation can be considered the life-blood of the future of the FUMC. Grant requests are invited and submitted on a Grant Request form. Requests are considered at the next board meeting.

***What are your activities/ programs/ ministries/ accomplishments for the last year?***

Revenue:

Year to Date June 30, 2019 the Foundation has received contributions of \$19,967; these came from distributions from two FUMC member estates, seven individual donations and monthly donations from approximately 23 families that contribute through the Miracle of 1854 program.

Grants:

Through August 15, 2019 the Foundation made grants of \$35,428 and has additional \$17,205 remaining to be granted this year. Year to date grants have been made as follows:

College Scholarships to 8 recipients	\$13,000
Board of Trustees	10,532
Church Council	6,319
FUMC Pre-School	2,317
Youth Room Carpet	1,727
Pastor's Good Shepherd Fund	1,185
Ludhiana Christian Medical college	<u>348</u>
Total	\$35,428

In prior years the Foundation provided key financial aid in procurement of the Stony Point campus, repair of the preschool playground, construction of the Stony Point Community Garden, procurement of the dishwasher and the installation of the money-saving solar system.

***What are your goals and plans for the next year?***

- Education of the church membership relative to the long term value of Foundation giving.
- Continue to recognize the various types of giving: 1854 monthly gifts, Memorial gifts, gifts honoring a person or event (birthday, anniversary, special friend), Legacy gifts such as wills and estates, Insurance, etc.
- Monitor the investments
- Recognize and honor the Legacy Society membership.
- Continue to encourage grant requests which meet the purpose of the FUMC and the Foundation.

***What goals or benchmarks have you set to measure success/effectiveness?***

The Foundation is 35 years old and began with \$2,500 and a dream. As of June 30, 2019, the fund account value of our investments is \$1,548,065, an increase of \$68,631 over June 30, 2018. Over the years the Foundation has granted over \$1 million to fulfill requests. This is our church at its best!

**The Foundation Board of Directors invites and encourages you to participate in the Foundation giving as a part of assuring the future of the First United Methodist Church of Santa Rosa, its ministries and programs. Become an integral part of the future of our church. Ask a director more about how your wishes and goals can be protected forever.**