

REPORT TO CHURCH COUNCIL of FIRST UNITED METHODIST CHURCH OF SANTA ROSA, CA
September 9, 2017

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	Charlene Simons
Marty Wait, Treasurer	Charlie Fields
Joyce Milks, Secretary	Jim Wieschendorff, Past President
Steve Zwick, Investment Director	Larry Thompson (Charter Member)
Arnie Hale, Communications	Blake Busick, Senior Pastor

Meetings are held (when, where):

Quarterly usually on the third Tuesday of the Months of February, April, August and November. For dates of meetings and location, visit the website at www.umfsr.org

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

OUR PURPOSE

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.

A gift to the Foundation never stops giving.

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.

In 2017, the board has issued \$38,770 grants year to date, with an adopted spending plan of \$42,330.

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

- College scholarships for students engaged or associated with FUMC (\$17,500).
- Regular committed funds for: the Church Council (\$4210), the Board of Trustees (\$7016), the FUMC Preschool (\$1735), the Good Shephard Fund (\$876), and the Ludhiana Christian Medical School (\$252), some of which are bequest distributions.
- Just to name a few accomplishments:
 - In prior years the Foundation was key financial aid in procurement of the Stony Point campus, repair of the preschool playground, 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 33 years old and started with \$2,500 in the first year. As of June 30, 2017, the account value of our investments is \$1,354,809.63. 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.

Respectfully submitted,

**Jim Wieschendorff, Past President
Marty Wait, Treasurer
For the 2017 Board of Directors**