

UU FOUNDATION MAKES A DIFFERENCE

When John Mitchell came to the Unitarian Universalist Congregation of Phoenix, it was hard to get around. John used a wheelchair. The only possible entrance was the door at the end of the hall furthest from the sanctuary. Often this door was locked. The parking lot near the door was not paved. The accessible bathroom, also far from the sanctuary, was makeshift and not very inviting.

When John died in 1998, he left the Congregation a gift, through the Foundation, of \$150,000, the largest it had ever received. He expressed his hope that the funds would help create universal access to the building. He recommended that the money be used both for current large projects and as continuing Foundation funds.

An accessibility committee was formed in 2002. Thanks to John's generosity, in 2004 the Foundation made a \$45,000 grant to the Congregation to further the work. In addition, thanks to many gifts of all sizes, the Foundation made a \$50,000 loan to the Congregation for the work. When construction began, Foundation funds were used as a guarantee, making a bank loan possible. Today, thanks to the generosity of so many members and friends, UUCP has made significant strides towards a more welcoming and accessible campus.

The Unitarian Universalist Foundation of Phoenix (the "Foundation" or UUFP) is a not-for-profit 501(c)(3) corporation formed on December 12, 1974. The Foundation supports the Unitarian Universalist Congregation of Phoenix (UUCP).



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UNITARIAN UNIVERSALIST FOUNDATION OF PHOENIX

*Supporting the Present,
Ensuring the Future.*

WHY HAVE A FOUNDATION?

Why? So we can realize current dreams—and grow bigger dreams for the future.

The only purpose of the Unitarian Universalist Foundation of Phoenix is to benefit the UU Congregation of Phoenix. Through gifts and loans, the Foundation assists with projects such as long range programs and major building and property improvements that cannot normally be sustained through annual operating contributions. The more the Foundation Fund grows, the closer we come to fulfilling the Congregation's mission.

SUPPORTING THE PRESENT

Each year the Foundation has historically distributed to the Congregation an amount equal to five percent of Foundation assets at the end of the most recent calendar year. In 2016 the distribution to the congregation's operating fund is expected to be approximately \$55,000. In addition, the Foundation has committed \$275,000 towards the 2017-2020 Capital Campaign in honor of one of our Chalice Keepers, Margret Herrick.

The Congregation's Board may formally request assistance from the Foundation, for projects that support long-term growth and health of the Congregation and Unitarian Universalism.



ENSURING THE FUTURE

As the Congregation looks ahead, there are dreams of a more accessible front entrance, of renovations to the patio, of renovations to the Memorial Garden, to name a few.

As the Foundation grows, through legacy or planned gifts and gifts honoring or in memory of loved ones, our dreams will come closer to reality.

As of January 2019, the Foundation Fund balances were:

UUFP Fund:	\$857,587.02
Memorial Garden Fund:	\$36,253.67
Rem. Capital Campaign Pledge:	\$150,000.00
Total:	\$1,043,840.69

The UUFP Memory Book, kept in the office, is a permanent record of these gifts. To learn more about providing for the Foundation in your estate planning, please see our **Chalice Keepers: Leave a Legacy of Love** brochure or contact a member of the Foundation Board. To make a gift in honor of someone, you may write a check to the Foundation and include 'in honor of' in the memo line.

MEMBERSHIP AND BOARD OF DIRECTORS

Every member of the Congregation is a member of the Foundation. Six directors are elected by the members at the Foundation's annual meeting, usually held in conjunction with a meeting of the Congregation. Directors serve overlapping three year terms.

Working with our financial advisors and operating from a conservative investment philosophy, the Board manages the Foundation Fund for growth and stability. The Board considers and makes disbursements. And finally, the Board promotes giving to the Foundation and offers programs related to personal financial management and legacy or planned giving.

2018-2019 Board of Directors

Diana Ashley, President
Terry Lockwood, Treasurer
Pierre Tariot, Secretary
Ellie Anderla, Member-At-Large
Jan Wise, Member-At-Large
Diane Targovnik, Member-At-Large
Rev. Margret A. O'Neill
Lora Gustafson, Staff Support
Vince Waldron & Mary Dawes,
UUCP Board Co-Presidents