

Thank you for all that you have given to  
the Foundation:

- Prayer
- Vision and ideas
- Advice and counsel
- Time
- Encouragement and moral support
- Leadership

Thank you for all that you have given to  
the Foundation:

■ In-kind support

- Products
- Services
- Staff and services from WPC
- Office space from the Towers

Thank you for all that you have given to the Foundation:

- Financial support
  - Support of Foundation operations
  - Designated gifts to other ministries
  - Donor-advised or “to be designated” funds
  - Current gifts
  - Deferred gifts

**We value your input!**

**Please go forth and be ambassadors for the  
Foundation!**

# Vision of the Foundation

## **Mission:**

*To serve people by assisting them to discover their mission, vision, values and goals so that through financial stewardship the transforming presence of the kingdom of the Lord Jesus Christ will be extended in Rock Hill and throughout the world.*

# Vision of the Foundation

## **Vision:**

*To see people so taken with God that lives are being transformed and the world is being impacted through the faithful stewardship of God's people which will result in strategic funding for kingdom ministries.*

# Other statements of our vision

*Helping each person in the Westminster family to consider and carry out the particular plan of stewardship that they believe God has set out for them.*

# Other statements of our vision

*Building God's Kingdom by helping believers to plan their stewardship in an effective, strategic, heartfelt and Biblical way, through gift planning, estate design and other resources.*



# Other statements of our vision

*Ministry of stewardship  
that results in fundraising.*

# Other statements of our vision

*A ministry of stewardship:  
Serving believers at  
Westminster Presbyterian Church,  
Westminster Catawba Christian School,  
Westminster Towers  
and beyond.*

# Broad view of stewardship

God is the owner of all and He has placed certain things in our lives – people, property, passions on our heart – and we are to be good stewards, good managers of what He has entrusted to us.

# Particular plan of stewardship

. . . the particular plan of stewardship that you believe God has set out for you . . .

- Each set of circumstances is different: stage in life, family situation, passions on the heart, etc.
- An individualized approach to stewardship planning, not “one size fits all”
- God’s timing, not the Foundation’s timing

## **What ministries will the Foundation support?**

- WPC and its ministries
- Westminster Catawba Christian School
- Westminster Towers
- Other Gospel-based ministries

### **Who does the Foundation serve?**

- Westminster “family”- approximately 1,500 families
  - Church (members & visitors: 1,000+)
  - School (parents: 500; alumni: 500 est.)
  - Towers (residents: 160 and their families)
  - Eternal (members & visitors: 100+)
- Community at-large

# History of the Foundation

## **Planning Group:**

### **Attendees**

Shelton Sanford

Frank Barnes

Willie Stephenson

John Blumenstein

Rich McKenrick

Jon Brownfield

Jimmy Bagley

John Barnes

Paul Vehaun

Tony Fountain

# History of the Foundation

## **Planning Group:**

First Meeting

September 22, 2003

Subsequent Meeting

October 29, 2003



# History of the Foundation

## **Task Force:**

### **Members**

Jon Brownfield (Chair)

Shelton Sanford

Sue McCauley

Wayne Helms

Sig Huitt

Hank Sipe

Rich McKenrick

# History of the Foundation

## **Task Force:**

### First Meeting

December 10, 2003

### Subsequent Meetings

Jan. 5, Feb. 2, Mar. 15, Apr. 5, June 7 & 28  
2004

# History of the Foundation

Bylaws adopted

August 16, 2004

amended September 20, 2004

# History of the Foundation

Foundation formed

November 12, 2004

charter amended February 10, 2005

# History of the Foundation

## **Initial Board of Directors**

Jon Brownfield (Chair)

Randy Graham

Sue McCauley

Wayne Helms

Sig Huitt

Hank Sipe

Steve Heckard

E.L. Barnes

Elvin Walker

*Rich McKenrick & Shelton Sanford, ex-officio*

# History of the Foundation

## **Board of Directors**

First Meeting

November 22, 2004

# History of the Foundation

## **Election of Officers**

**January 5, 2005 (re-elected for 2006 on Oct. 5, 2005)**

**President, Jon Brownfield**

**Vice President, Sue McCauley**

**Secretary, Wayne Helms**

**Treasurer, Steve Heckard**

# History of the Foundation

**Established Director terms:** January 5, 2005

*Class of 2007*

Elvin Walker & Hank Sipe

*Class of 2008*

Steve Heckard, Randy Graham & Jon Brownfield

*Class of 2009*

Sig Huitt, Wayne Helms, Sue McCauley



# History of the Foundation

**Committees established: August 3, 2005**

First meeting of all committees: Sept. 20, 2005 (with Bruce)

*Marketing*

Sig Huitt (chair), Sue McCauley

*Fiduciary*

Steve Heckard (chair), Randy Graham & Hank Sipe

*Personnel/Budget*

Wayne Helms (chair), Elvin Walker

# History of the Foundation

## **Bruce Owens and The Coaching Group**

### ■ Existing relationship

- Shelton serving on MTW board
- Seminars by Bruce Owens/Ray Lyne at WPC

### ■ Meetings with Bruce

- Initial meeting: March 2, 2005
- Subsequent meetings: May 5 & Aug. 3, 2005
- Strategic planning: June 1, 2005 (5 hours)

# History of the Foundation

## **Executive Director**

- Search for Director began Summer 2005
- Initial interviews: September 20, 2005
- Follow-up interviews: November 2, 2005
- Offer extended: December 7, 2005
- Executive Director attended first board meeting: January 4, 2006
- Began employment: February 27, 2006

# 2006 Areas of Focus

## **General communications and public visibility**

- **General marketing**
  - Marketing Committee
  - Executive Director
  - Lifestyle Giving materials
  - Leadership/staff at WPC, Towers & WCCS

# 2006 Areas of Focus

## **General communications and public visibility**

- Teaching Biblical principles & practical tools of stewardship planning
  - Executive Director
  - Bruce Owens/The Coaching Group
  - Lifestyle Giving materials

# 2006 Areas of Focus

## **Working one-on-one with members of the Westminster family**

- Executive Director
- Bruce Owens/The Coaching Group
- Lifestyle Giving

# 2006 Areas of Focus

## **Organizational matters and infrastructure**

- Fiduciary Committee
- Personnel/Budget Committee
- Executive Director
- Bruce Owens/The Coaching Group
- Lifestyle Giving
- WPC staff

# 2006 Accomplishments

## **General communications and public visibility**

- Marketing - Printed visibility at WPC
  - Newsletter (3 times @ 1,000 each)
  - Direct Mail (IRA giving opportunity - 200 letters)
  - Direct Mail (officers/staff – 2 times @ 100 each)



# 2006 Accomplishments

## **General communications and public visibility**

- Marketing - Printed visibility at WCCS
  - Newsletter (1 time @ 600)
  - Direct Mail (Lisa McCutchen intro – 120 letters)
  - Direct Mail (friends/parents – 550 letters and year-end tax planner)
  - Direct Mail (board letter (12))

# 2006 Accomplishments

## **General communications and public visibility**

- Marketing - Printed visibility at Towers
  - Newsletter (3 times @ 500 each)
  - Direct Mail (friends/residents – 500 letters and year-end tax planner)
  - Direct Mail (board letter (12))
  - Direct Mail (board/community advisory committee letter (25))

# 2006 Accomplishments

## **General communications and public visibility**

- Marketing – Executive Director visibility
  - ABF classes (8 times – total of 200)
  - Inquirer’s Seminar (2 times – total of 130)
  - Vision Campaign home visits (7 times – total of 200)
  - Towers “Meet & Greet” (20 residents) and general Towers visibility
  - Meetings of WPC elders, deacons, Towers board, WCCS board, Eternal officers & Vision leadership

# 2006 Accomplishments

## **General communications and public visibility**

- Marketing – Printed materials
  - Logo, tag lines, business cards and stationery
  - “*God’s Plan for Our Stewardship*” brochure
  - “*Creative Strategies for Giving*” brochure
  - 2006 Towers/Foundation year-end tax planner
  - 2006 WCCS/Foundation year-end tax planner
  - “*How to Avoid Taxes on Appreciated Property*”
  - “*Guide to Planning Your Estate*”

# 2006 Accomplishments

## **General communications and public visibility**

- Teaching Biblical principles/practical tools of stewardship planning

Seminars (75 to 100 attendees, total)

*“Practical and Spiritual Aspects of Estate Design”*

May 1, 2006 - Foundation Board

May 15, 2006 - WPC Officers

November 19, 2006 - Towers Board and Community Advisory Committee

# 2006 Accomplishments

## **General communications and public visibility**

- Teaching Biblical principles and practical tools of stewardship planning
  - Stewardship Curriculum

# 2006 Accomplishments

## **Working one-on-one with members of the Westminster family**

- Estate designs and other stewardship planning
  - 25 families

# 2006 Accomplishments

## **What resources have been channeled to ministry?**

- Facilitated current gifts to the Foundation or other ministries
  - Current gifts to the Foundation (either undesignated or donor-advised)
  - Other current gifts straight to ministry?



# 2006 Accomplishments

## **What resources have been channeled to ministry?**

- Facilitated deferred gifts to Foundation
  - Revocable and amounts change with time
  - Deferred gifts to Foundation
    - Some to pass through to Westminster ministries
    - Some undesignated
    - Some to pass through to other Gospel-based ministries
  - Other current gifts straight to ministry?

# 2006 Accomplishments

## **Organizational matters and infrastructure**

### ■ Budget

- 2007 budget to be funded by members of Foundation board, others, WPC
- No administrative fees planned to be charged against designated contributions or donor-advised funds in 2007

# 2006 Accomplishments

## **Organizational matters and infrastructure**

- Executive Director Training
  - Coaching/mentoring by Bruce Owens
  - Lifestyle Giving mentoring program
    - 4-week program (attended weeks 1,2, and 4)

# 2006 Accomplishments

## **Organizational matters and infrastructure**

- **Conflict of interest policy**
  - Adopted June 28, 2006
- **Tax-exempt status**
  - Applied for on Sept. 27, 2006
  - Approved on November 17, 2006

# 2006 Accomplishments

## **Organizational matters and infrastructure**

- Pension Protection Act of 2006
  - IRA direct transfer opportunity
  - Other compliance and reform provisions

# 2006 Accomplishments

## **Organizational matters and infrastructure**

- Donor-advised fund program
  - December, 2006

# 2007 Goals & Plans

## **General communications and public visibility**

### ■ Marketing

- February 13, 2007 Appreciation Dinner
- Continue Sunday School visits
- Continue Inquirer's Seminar
- Vision Campaign follow-up
- Ministry moment – April 2007

# 2007 Goals & Plans

## **General communications and public visibility**

### ■ Marketing

- Foundation newsletter
- Website: [westminsterfoundation.org](http://westminsterfoundation.org)
- Review logo and tag lines



# 2007 Goals & Plans

## **General communications and public visibility**

### ■ Marketing

#### – Ministry specific marketing

- WPC
- Towers
- WCCS
- Other Gospel-based ministries

# 2007 Goals & Plans

## **General communications to constituents**

### ■ Marketing

#### – Community wide marketing

- Possible newspaper article on planned giving, legacy-building, etc.
- Speaking engagements
- Longer version of video

# 2007 Goals & Plans

## **General communications and public visibility**

- Teaching Biblical principles and practical tools of stewardship planning

### Seminar

*“Practical and Spiritual Aspects of Estate Design”*

Feb. 27, 2007 (Towers/others)

May 1, 2007 (WPC)

WCCS – To be determined

Eternal – To be determined

# 2007 Goals & Plans

## **General communications and public visibility**

- Teaching Biblical principles and practical tools of stewardship planning

Curriculum:

Crown Ministries course?

Treasure Principle course?

# 2007 Goals & Plans

## **Working one-on-one with members of the Westminster family**

- Estate designs and other stewardship planning
- Facilitate current gifts to Foundation and other ministries
- Facilitate deferred gifts to Foundation and other ministries

# 2007 Goals & Plans

## **Organizational matters and infrastructure**

- Budget/fundraising to support Foundation operations
- Continue training

# 2007 Goals & Plans

## **Organizational matters and infrastructure**

- Policies and procedures – Consider:
  - Acceptance of real estate
  - Acceptance of business interests
  - Acceptance of personal property (cars, jewelry, etc.)
  - Charitable gift annuity program

# 2007 Goals & Plans

## **Organizational matters and infrastructure**

- Separate from the church's financial recordkeeping
- Systems/support
  - Donor management software (Raiser's Edge?)
  - Financial staff or contract services?
  - Financial software?
  - Other IT resources (Crescendo software?)



# What does the future hold?

## **General communications and public visibility**

- Continue general marketing
- Teaching the principles and tools of stewardship planning
  - Fully developed curriculum
  - Continuation of seminars

# What does the future hold?

**Working one-on-one with members of  
the Westminster family**

# What does the future hold?

**Organizational matters and  
infrastructure**

# WESTMINSTER

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## MINISTRIES FOUNDATION

