

# 2014 ANNUAL REPORT





## A letter from our President

Greetings!

On behalf of the St. Lorenz Foundation Board of Directors, I am pleased to provide you with our 2014 Annual Report. The entire St. Lorenz Foundation team is glad to share the enclosed information with you and help you see your Foundation at work!

The St. Lorenz Foundation was formed in 1995 to assist our members in their personal stewardship goals as we provide ongoing support for St. Lorenz Lutheran Church and School. Through the generosity of our members, we have been able to provide significant support for the ministry here at St. Lorenz.

The St. Lorenz Foundation team starts with our donors. For nearly two decades now, faithful individuals have shared memorial gifts, gifts of life insurance, annual remembrance gifts and estate gifts with the Foundation. The assets of our Foundation have been managed and invested to allow us to provide continuing support for our church and school.

The Foundation, which is governed by the Board of Directors, is a separate legal entity that serves to support St. Lorenz Lutheran Church and School. We do not make gifts to other groups or organizations. In addition to the Board of Directors, two committees provide significant leadership – the Planned Giving and Estate Planning Committee and the Finance Committee. We praise God for the work of these individuals as together we pledge to be good stewards of the resources entrusted to us.

Should you be considering a gift to the Foundation and/or would like a consultation, please begin by contacting our Executive Director or any member of the Foundation team.

Thanks for taking time to read through our report. May God continue to bless you throughout this New Year.

Sincerely,



Robert Rummel  
President – St. Lorenz Foundation



**Bob Rummel**, St. Lorenz  
Foundation President

**COVER:** Dave Sievert is the Director of Instrumental Music at St. Lorenz. As a congregation, we are blessed by his ministry and faithful service to our students and our members. Mr. Sievert is currently dealing with multiple system atrophy (MSA). To provide support for him and for the instrumental program at St. Lorenz, the Foundation made resources available to bring Michael Keller to St. Lorenz. Together, they make a great team – providing an excellent program for St. Lorenz.



## Financial Highlights

| <b>Foundation Distributions:</b>                     | <b>2014</b>      |
|--|------------------|
| Dedicated Grants (specified by donor or board) ..... | \$286,556        |
| Grants (awarded by board based on requests) .....    | \$248,532        |
| Reaching for Tomorrow Campaign .....                 | \$250,000        |
| <b>Total Distributions .....</b>                     | <b>\$785,088</b> |

### General Fund Balance:

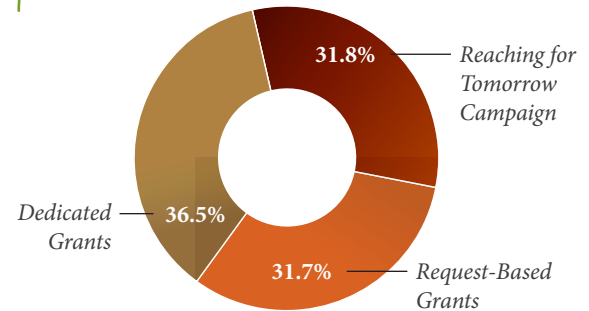
|  |                    |
|--|--------------------|
| Northern Trust Investments .....                   | \$4,951,237        |
| Frankenmuth Credit Union .....                     | \$80,420           |
| Life Insurance Cash Values (Foundation-owned)..... | \$400,365          |
| Local Stock .....                                  | \$50,000           |
| <b>Total General Fund Balance.....</b>             | <b>\$5,482,022</b> |

### Dedicated Fund Balances:

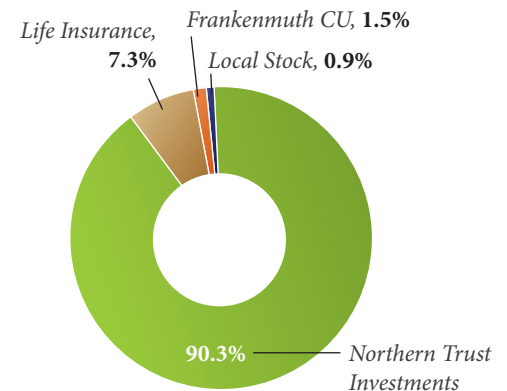
|   |                    |
|---|--------------------|
| Pastoral Endowment .....                      | \$2,892,772        |
| Vicar Endowment.....                          | \$629,328          |
| Missions.....                                 | \$211,129          |
| Synodical Institution Student Aid.....        | \$147,374          |
| St. Lorenz School Family Aid.....             | \$212,570          |
| Communications/Operating/Caring .....         | \$1,233,286        |
| Pastor/Teacher Scholarship .....              | \$28,548           |
| Educational Enhancement Fund .....            | \$1,032,443        |
| Retired Worker Health Insurance Support ..... | \$7,319            |
| <b>Total Dedicated Fund Balances.....</b>     | <b>\$6,394,767</b> |

**Total of General and Dedicated funds as of 12/31/14 ..... \$11,876,789**

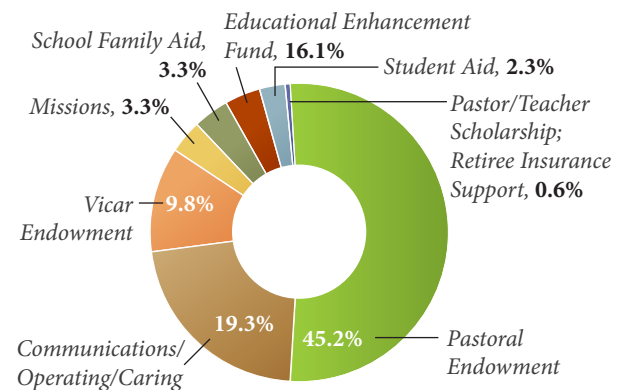
### Foundation Distributions



### General Fund Balance



### Dedicated Fund Balances







## Dedicated Projects for 2014

*Dedicated Projects are those that, through board action and donor direction, are funded every year. In 2014, a total of \$286,556.40 was distributed. On an annual basis, 5% of the corpus of the accounts is distributed.*

**Pastoral Endowment** – Established through a generous gift to St. Lorenz, the Pastoral Endowment provided \$149,262.45 to St. Lorenz in 2014. The Pastoral Endowment contributes to the cost of our Lead Pastor and the new Visitation Pastor.

**Vicar Endowment** – Established just a few years ago, the Vicar Endowment provided \$32,173.30 to the congregation in 2014 to support the cost of the Vicar Program. The endowment has a goal of reaching \$1 million to provide for the total cost of the program for years to come. The current balance in the account is just over \$630,000.

**Missions** – Two donor-designated gifts provide ongoing support for Mission work. These gifts provided \$10,893.80 in resources in 2014 as our congregation reached out to share How Beautiful It Is to Live with Jesus!

**Student Aid** – A number of families have contributed to ongoing support for those preparing for ministry at our seminaries and universities. Together, they provided \$9,077.20 to the Student Aid Fund for annual distribution.

**School Family Aid** – Every year, there are families that are challenged to meet the cost of sending their children to St. Lorenz Lutheran School. In some cases, it is due to multiple children in a family; in others, it is a loss of a job or other sources of income. A total of \$10,968.25 was made available to support these families in 2014.

**Communications/Operating/Caring Ministry** – Each year, this donor's gifts are equally divided into three areas: Communications (including the broadcast of our services), the congregational Operating Fund and the Caring Ministry through Stephen Ministries are provided support. This year, a total of \$63,635.55 was made available.

**Educational Enhancement Fund** – The first distribution from this account totaled \$10,168.25 and was awarded to support Pastor Kaiser and Pastor Bender to enhance their ministry at St. Lorenz through special educational opportunities.

**Health Insurance Support** – The cost of health insurance continues to rise. This fund provides resources to assist pastors and teachers who retired from St. Lorenz. In 2014, \$377.60 was distributed.

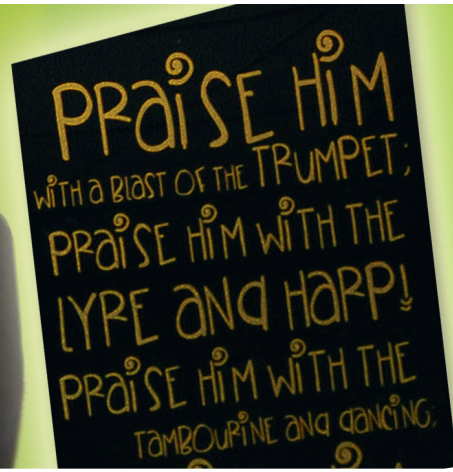
**“Imagine sending four pastors to Phoenix for a team retreat and to attend a conference! It wouldn’t be possible without our Foundation’s generous support.”**

— Rev. Mark Brandt  
Lead Pastor, St. Lorenz Lutheran Church





Visitation  
Pastor Call  
Committee



## Grant-Funded Projects for 2014

**Best Practices Conference and Retreat** – Our sister congregation in Phoenix, Arizona, hosts a special conference each year focusing on Best Practices for Congregations and also provides support for our Ministry Team. In 2015, our pastors will attend this conference, provide leadership in presenting at the event and together focus on what can be learned to support their ministry at St. Lorenz. **Amount: \$6,000**

**Visitation Pastor** – With a goal to make personal contact with all members' households, a Visitation Pastor will be added to our pastoral team. The Foundation is providing funding for this program for two years. **Amount: \$60,000**

**Connect Media Development** – Art and media resources are used to enhance the worship experience for participants during the Connect Services. These funds will be used to purchase background art for the presentations as well as short videos for the services. **Amount: \$5,000**

**Family Ministry** – This project is designed to help train and equip leaders in support of a Family Ministry that is home-centered and church-supported. The program will provide training costs, host a local training event and provide devotional materials for the Family Faith Walk program. **Amount: \$14,300**

**External Assessment Tool** – It is important to evaluate our school curriculum and student academic growth using an external assessment tool. For years, this has been the Iowa Test of Basic Skills. This grant provides the opportunity to upgrade to an online service, Northwest Evaluation Association (NWEA), which provides students, parents and teachers with immediate feedback and suggestions for improvement. **Amount: \$5,500**

**“It is a true privilege to be involved in the process of calling another pastor. Thank you to our St. Lorenz Foundation for providing funding for our Visitation Pastor.”**

— *Gale Howe*  
Member, Call Committee

**School Video Equipment** – From the school, we broadcast school chapel services, special school events and Connect Worship Services. The equipment was in need of an update. This grant provided the funds for a new video mixer and the necessary equipment to integrate it into our system. The update will enhance the broadcasts and improve the signal sent to our viewers. **Amount: \$5,000**

**Assistant Media Director** – This grant will be used to provide a part-time staff person to work with the volunteers managing the media used at the church. This person will provide technical expertise for our worship broadcast as well as the media used on the monitors during the services. **Amount: \$7,500**

**Steeple Lighting** – To conserve energy and to provide enhanced lighting of our steeple, new LED lights have been installed. This grant provided the funds for the engineering, lights and installation of the new lighting system. **Amount: \$7,600**

**Steeple Painting** – The church steeple's exposure to the elements and its wood shingle construction make regular maintenance important. Painting and lighting the steeple enhances this beacon to the community as we proclaim our love for our Lord. **Amount: \$15,542**



**Valley Lutheran Scholarships** – This project provides individual scholarships of up to \$1,000 for each St. Lorenz student attending Valley Lutheran High School. Applications are processed through the St. Lorenz Lutheran Church and School Executive Director. The scholarships offer encouragement and support for families deciding to continue their student's Christian education through high school. **Amount: \$15,000**

**Staff Computers** – Our staff does an excellent job using technology for teaching, planning and regular professional tasks. This grant provided updated equipment for staff members as they make continued use of technology in the workplace. **Amount: \$9,000**

**Assistant Director of Instrumental and School Music** – Dave Sievert, our Director of Instrumental Music, has been diagnosed with multiple system atrophy (MSA). While he continues to serve full-time leading our school and congregational instrumental programs, each day presents a challenge. This grant provided funding to call Michael Keller as Assistant Director, which will allow us to maintain a quality program while also providing assistance for Mr. Sievert. The grant also will provide guidance for Mr. Keller as he grows professionally. **Amount: \$39,000**

**Youth Mission Trip** – The youth of our congregation have participated in four summer mission projects. The funds from this grant will help support our youth in a fifth year in 2015. **Amount: \$6,000**

**Wireless Infrastructure** – Students in grades 3 through 8 are now using our wireless infrastructure for everything from accessing online textbooks to researching special projects. These funds assisted in upgrading our infrastructure to handle the current and foreseeable future needs for network and Internet access. **Amount: \$32,000**

**Willing Workers Warehouse** – Our Willing Workers provide valuable service to members of our congregation and our community. The funds from this grant will be used to update the storage warehouse that holds their tools and materials. **Amount: \$4,000**

**Adult Bible Class Leader** – This grant will be used to provide additional staff time to support our Adult Bible Class program. From planning to teaching classes, Scott Mueller will support those who teach Bible classes as well as encourage attendance by all. **Amount: \$18,000**

**Executive Director Continued Education** – Our new Executive Director, Jeremy Frank, is doing an excellent job. The funds from this grant provide opportunities to learn how to better serve our congregation and manage our resources. **Amount: \$3,000**

**After-School Art Program** – This program will provide an opportunity for students to explore their gifts in art beyond the classroom setting. The funds will offset the expenses of an after-school art offering. **Amount: \$2,500**







## About the St. Lorenz Foundation

The St. Lorenz Foundation exists to support our Lord's work through His St. Lorenz congregation. The Foundation provides a vehicle for donors to make gifts that will continue to support the work of our Lord until judgment day.

The Foundation was formed in the fall of 1995. Founding board members included Harold Braeutigam, Stephen List, Morrall Claramunt, Jonathan Zehnder, Lynn Zuellig, Arnold Middeldorf and Pastor C.W. Hoesman. The team established the Foundation to provide ongoing support for our Lord's work through St. Lorenz Lutheran Church and School.

Today, the St. Lorenz Foundation receives gifts in many forms to support the ministry of St. Lorenz Lutheran Church and School. The funds are invested through the use of professional investment managers and monitored by a Finance Committee and the Board of Directors. Each year, the Foundation distributes a minimum of 5% of the corpus to support the grant requests forwarded by the congregation.

The St. Lorenz Foundation is limited to receiving grant requests from St. Lorenz Lutheran Church and School. The Board of Directors has established clear Management Principles that guide the granting process. Grant requests are processed by the Planned Giving and Estate Planning Committee and forwarded to the Board of Directors for action. Grant requests are not accepted from individuals or organizations outside the congregation.







*Whoever speaks, as one who speaks oracles of God; whoever serves, as one who serves by the strength that God supplies—in order that in everything God may be glorified through Jesus Christ. To him belong glory and dominion forever and ever. Amen.  
1 Peter 4:11*



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Bonnie Bell, *Treasurer*  
Gus Braeutigam  
Rev. Mark Brandt  
Wayne Bronner  
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Herb Bernthal, *Vice Chairman*  
Karen Zehnder, *Secretary*  
Dan Bade  
Michael Fassezke  
Chris Frank  
Jeremy Frank  
Lloyd Nobis

#### Finance Committee

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Bonnie Bell, *Treasurer*  
Peter Bender  
Phil List  
Steve List

[www.stlorenzfoundation.org](http://www.stlorenzfoundation.org)