The Royal Rosarian Foundation Review

May 2023

To Support The Charitable Activities of the Royal Rosarians
Children at Risk, Scholarships for Our Youth, Community Spirit

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Amy Arasmith
Katherine Johnson
Linda White

Editor:
Connie Shipley

CANDIDATES for the ROYAL ROSARIAN FOUNDATION BOARD

Nate Aazzerah

The strongest reason for becoming a Royal Rosarian in 2022 was what I learned about our Foundation's work. I have attended almost every Board meeting since and have learned how the Foundation works and how I can contribute. Being on the auction committee with Michelle was another educational moment and I was glad to secure the ALSO artists for the great event it turned out to be.

My work with nonprofit organizations started in Junior High when a group of us formed a club to help senior citizens with yard work over the summer. Other non-profits I have worked in include Key Club in high school, Secretary my Junior year and President my Senior year; Aloha Youth Football (10 years); the Fundraising Guy at seven plus High schools; Trinity Lutheran Church Council member for three years; and more recently, as Council President, St. Jude Children's Hospital, as well as being on the Salvation Army board in Gresham since 2013, and now serving as the Board President.

After retiring from a career in Radio in 2013, I started coaching youth and high school sports; later, I became part of the security team at the Fir Ridge Campus in the David Douglas School district until 2023. A native Oregonian, I have many interests, like our nine kids, and of course, one of the best parts of having kids is the grandkids they give you! I am proud of my military service, especially serving in Korea as an MP.

My experience and desire to help the "Underdogs" (Kids) and our organization will serve me well on the Foundation Board. I am asking for your Vote.

Thank you.
Sir Knight Nate Aazzerah

!

Barbara Brennan

During my tenure as a Royal Rosarian, I chaired the Foundation's annual Hearts and Roses Auction for six years, served one term as a Foundation Board member (Secretary), served two years on Council, actively took part in several Rosarian committees, and have participated in every out-of-town festival at least once.

In addition to marching in parades, a highlight of being a Rosarian is supporting the Royal Rosarian Foundation's contributions to children and youth, the Rose Festival, and other members of our community.

I want to offer my skills, experience, and time to serve on the Foundation Board of Directors to ensure the Foundation remains financially strong and will achieve its important mission–to Support the Charitable Activities of the Royal Rosarians.

Dame Barbara Brennan

Richard Horswell

Richard Horswell, knighted in 2007, has had extensive experience in the governance of not-for-profit organizations and philanthropic concerns.

He is a past trustee of the University of Oregon Foundation; past president of the University Club of Portland Foundation; former member of the membership committee of Grant makers of Oregon & Southwest Washington; and has served as an advisor to numerous organizations on strategy, management, and fundraising/development. He is the Principal Creative Executive of The Horswell Collection™ and Broker at Windermere Realty Trust. He co-founded and was chair of

Europa Communications, Oregon's second-largest internet service company and largest web/online advertising company in the Pacific Northwest at its successful sale in 1999.

His previous Royal Rosarian experience includes creating the Hosting by Starlight event and being the marketing chair for the 2009 Hospitality Weekend. He previously served as a Rose Festival Foundation Board of Directors member.

Sir Knight Richard Horswell

President's Message

We greatly appreciate the donations you make to our Foundation! Without your generosity, we would not be able to accomplish the many good things we do.

The Foundation is part of the Royal Rosarians, and we are the philanthropy part of the organization. Everyone in the Royal Rosarians is also a member of the Foundation. We meet the last Wednesday of each month at the Lloyd Center Double Tree by Hilton in the Portland Room at 6:00 pm. All Royal Rosarians are invited to attend.

Our only real fundraiser is the auction on February 25th at the Lloyd Center Double Tree by Hilton. Once again, Michelle Veentjer was the Council and chairperson of this event, and she did a fantastic job along with her committee. We had a great turnout, especially on such a weather forecasted to poor evening. We raised about $65,000 net that evening. This money is used for Portland-area-at-risk students through our field trip program, help with the Transitional School for homeless children, and other related events involving needy children. This covers half our budget; the other half involves the Traveling float and Grand Floral Parade Float. This is required through the Memorandum of Understanding (MOU) between the Royal Rosarians and the Rose Festival Foundation. Gary Stenberg is designing our float again as he did last year. I believe we all agree that the float last year was the best we had in the Grand Floral Parade, and this year's float looks like it will be even better. Gary and Carla do a great job on the design and building of the float. They have also been helping us with the Traveling Float.

We greatly appreciate the donations you make to our Foundation! Without your generosity, we would not be able to accomplish the many good things we do.

Most sincerely,
Scott Stuhl
Foundation President

85th Annual Rose Garden Contest

As we rush to meet deadlines during this busiest time of year, it is easy to forget why we Rosarians do what we do and the long-lasting impacts our actions may have on others.

Several weeks ago in the Sunday Oregonian obituary of a recently deceased Catholic nun, in addition to her significant life-long accomplishments, it noted, "She was also an avid grower of roses, being recognized by the Royal Rosarians in 2007 for her award-winning blooms." Being an award winner in the Royal Rosarian Rose Garden Contest obviously was very important to her!

Every year the Rose Garden Contest committee strives to honor those citizens in the greater Portland area who spend untold hours nurturing their roses and creating beautiful spaces. They beautify our city and keep alive our motto: "For you a rose in Portland grows."

The 2023 Rose Garden Contest Awards ceremony will be held at 6:30 pm Tuesday, June 20, in the Royal Rosarian rose garden at Washington Park. This beautiful program provides the opportunity for us to recognize and thank the winners and participants of this year's contest. Please plan to join us!

Appropriate attire for the evening is white uniforms (capes, gloves, no hats) for Council members, Dukes and Duchesses; green jackets and WHITE pants for the RGC committee; and summer casual wear for everyone else.

Duchess Marilyn Schultz
Rose Garden Contest Chair

Queens' Garden Party

The Queens' Garden Party committee is putting on a great luncheon for everyone at the DoubleTree Hotel on June 10th at noon. It will be held immediately following the Queens' Coronation at Peninsula Park, making it very special.

The queen and six princesses of the 1973 Court will be attending, along with past queens and princesses. It will be a wonderful event, and we look forward to seeing you there!

Dame Katherine Johnson
Queens' Garden Party Chair

Field Trip Program

Dame Debbie Day, Lord Chief Justice Craig Dirksen, Dame Kathy Fastenau, and Principal Tristin Burnett, McKinney Elementary School in the Hillsboro School District, holding the check she just received at a school assembly.

We had a banner year for the 2022-23 Field Trip Program. I am happy to report that we have added a new School District–Reynolds School district, and presented checks to four schools.

For 2023, the Royal Rosarian has distributed fifty-six checks, totaling $24,508.00 in funds, which can impact over 20,000 children. With the roll-over money accumulated by the schools through covid also being available for use this year, many field trips will be happening this year!

Many "Thank Yous" from the schools have been received. The school principals and secretaries shared that they and the children are thrilled to return to

normal and enjoy some field trips they haven't been able to do the last couple of years.

Dame Katherine Johnson
Chair, Field Trip Program

Community Transitional School

One of the Royal Rosarian Foundation's favorite charities is CTS, a private pre-K through 8th-grade school for homeless children. We provide an annual grant to partially fund one of the instructional assistants.

The news this spring at CTS is the completion of the long-desired bus barn! For years the school's three short yellow school buses have been victims of vandalism–slashed tires, broken windows, cut brake lines, and stolen catalytic converters. Now, after many delays, the buses have a secure home on the school's campus on Northeast Killingsworth Street.

Reliable transportation is an essential element for student success at the school, and it enables the children to post excellent attendance records. Every school day, the buses fan out over the Portland metro area, stopping at shelters, motels, and parking lots–wherever the children are staying, and bring them to a place where they receive meals, educational instruction, and nurturing.

The last day of the regular school year is Friday, June 9, and the summer program begins Monday, June 12.

Duchess Marilyn Schultz

The HEARTS AND ROSES Auction was a success!

With the theme, "Annual heARTS and ROSES Benefit Auction," the in-person Rosarian auction, was a special event focused on the arts. With everyone's support, the auction raised approximately $65,000 net for the Foundation programs this year.

Two artists from ALSO (Advocates for Life Skills &

Opportunity) painted fresh art pieces, the last items sold in the Oral Auction. It was a special moment for the artists and the audience. There was a cartoonist doing portraits during the Silent Auction. Matthew DiLoreto was the Auctioneer, and was a great part of the "Arts" theme of the evening, singing a special song he wrote about the evening on the piano.

Mark March 4th, 2024 on your calendar for next year's auction. Plans have already been started. Ian Lindsay, the previous year's auctioneer, will be back t o join us. We want you and your friends to plan on joining us, too. Reservations at the DoubleTree Hotel are in place. Donations are already being gathered. Michelle is looking for more committee members for next year's event and would love to hear from you now while the initial plans are being put together. Also, a new storage spot for the Auction items at her house is needed.

Thank you again for supporting the Royal Rosarian Foundation by contributing to and buying items at this annual event!

Michelle Veentjer, Minister of Foreign Affairs
Auction Council and chairperson

Clothes Closet

With Kathie Bagley's move out of state, the search is on for a new home for this project. The Day sisters organized the items, making the storage requirements much smaller.

Clothes Closet items will be available in the Hospitality Weekend area. Foundation board members are there to help you with any purchases you want to make. Pick up a backup white suit, green jacket, or slightly used casual wear for upcoming summer events.

And if someone has room for a couple of clothing racks in their garage or back bedroom, Scott will be happy to talk with you. The Clothes Closet is a source of income for the Foundation, and we want to see it continue.

Dame Connie Shipley

Financial Report

Royal Rosarian Foundation
Balance Sheet
As of April 25, 2023

	Apr 25, 23	
ASSETS		
Current Assets		
Checking/Savings		
1000 · Checking - Key Bank		144,683.52
1050 · Direct Depository - Key Bank		2,299.15
Total Checking/Savings		146,982.67
Total Current Assets		146,982.67
Fixed Assets		
1801 · Grand Floral Parade Chassis		10,000.00
1802 · Traveling Float Chassis		1,000.00
1803 · Traveling Float Trailer		1,000.00
1851 · Accumulated Depreciation		-12,000.00
Total Fixed Assets		0.00
Other Assets		
1260 · Fidelity Investments		152,540.45
Total Other Assets		152,540.45
TOTAL ASSETS		**299,523.12**
LIABILITIES & EQUITY		
Equity		
3110 · Endowment		15,000.00
3160 · Dedicated Field Trips		
3161 · Portland Metro	45,091.20	
3162 · Washington County	2,491.00	
3160 · Dedicated Field Trips - Other	20,736.00	
Total 3160 · Dedicated Field Trips		68,318.20
3190 · Dedicated At Risk Programs		13,824.00
3200 · Unrestricted		151,248.47
Net Income		51,132.45
Total Equity		299,523.12
TOTAL LIABILITIES & EQUITY		**299,523.12**

Royal Rosarian Foundation
Profit & Loss Statement
For the Period Ending April 25, 2023

Ordinary Income/Expense	Mar. 29 Apr. 25	7 Months YTD	Annual Budget
Income			
4000 · Fundraising Income			
Donations			
4133 · Unrestricted Donations			
4134 · Rosarian with dues	0	0	100
4135 · Life Member in-lieu of dues	0	0	500
4136 · Memorial Contributions	0	340	1,000
4137 · Donations - Fred Meyer	0	145	250
4138 · Donations - Amazon Smile	0	108	150
4139 · The Closet/Clothing Sales	0	0	500
4133 · Unrestricted Donations - Other	1,000	4,345	2,500
Total 4133 · Unrestricted Donations	1,000	4,938	5,000
4750 - Traveling Float	0	10,000	10,000
4753 · Rose Garden Contest	540	1,175	1,500
7201 · Dedicated Field Trips	100	15,100	10,000
Total Donations	1,640	31,213	26,500
Auction			
Auction Revenue			
4152 · Registrations	0	19,025	5,000
4153 · Donations & Other Pre-sales	0	2,680	5,000
4154 · Greater Giving Deposits	4,826	78,526	45,000
4156 · Paddle Raise - Restricted	500	6,670	40,000
4160 · Package Sales	680	680	
Total Auction Revenue	6,006	107,581	95,000
Auction Expenses			
4168 · Auction Cash Expenses	(12,447)	(40,830)	(48,000)
4170 · Greater Giving & Internet Fees	0	(1,231)	(2,000)
Total Auction Expenses	(12,447)	(42,061)	(50,000)
Net Auction Revenue	(6,441)	65,520	45,000
Total 4000 · Fundraising Income	(4,801)	96,734	71,500

Royal Rosarian Foundation
Profit & Loss Statement
For the Period Ending April 25, 2023

	Mar. 29 Apr. 25	7 Months YTD	Annual Budget
Expense			
6000 · Administrative Expenses			
6100 · Accounting Fees	0	805	900
6300 · Insurance	0	4,995	5,200
6400 - Office Supplies	0	13	
6500 · Postage	63	308	400
6800 · Taxes & Fees	0	115	175
6900 · Website	0	0	1,000
Total 6000 · Administrative Expenses	63	6,237	7,675
7050 · Traveling Float Costs			
4775 · Decorating Expense	0	7,000	14,000
4777 · Operating Expense	0	136	8,000
4778 · Repairs & Maintenance	2,178	2,226	1,000
Total 7050 · Traveling Float Costs	2,178	9,362	23,000
7100 · Community Spirit			
4757 · Rose Garden Contest Expenses	68	188	2,000
7102 · Grand Floral Parade Float	0	0	24,700
7103 · Grand Floral Bus & Flowers	0	0	250
7104 · Queens' Garden Party	0	0	1,000
7106 · PRFF Auction Sponsorship	0	0	500
7108 · PRFF Honors Sponsorship	0	0	500
7110 - Washington Park Rose Garden	(2,975)	1,750	3,000
Total 7100 · Community Spirit	(2,907)	1,938	31,950
7200 · Philanthropic Giving			
7204 · Field Trip Grants	4,545	24,508	25,003
7208 · Sister City Associations	0	500	500
7210 · Community Transitional School	7,000	7,000	7,000
7212 · PRFF Court Outreach	5,000	5,000	5,000
7290 · Grants not budgeted	0	0	2,000
Total 7200 · Philanthropic Giving	16,545	37,008	39,503
Total Expense	15,879	54,545	102,128
Net Ordinary Income	(20,680)	42,188	(30,628)
Investment Income			
4637 · Gains and Losses	2,234	9,490	0
4638 - Account Fees	0	(546)	0
Net Investment Income	2,234	8,944	0
Net Income	**(18,446)**	**51,132**	**(30,628)**

Explanation of line item 7212 - PRFF Court Outreach

The Rosarian Foundation, to support the Portland Rose Festival Foundation, funds programs that reach out to the community. During their Centennial year of 2007 and the years following, they had a Living History Program. Mayor Harry Lane and Mrs. Pittock visited third-grade classrooms throughout the area, sharing stories of the early history of Portland and how Portland came to be called the City of Roses. Then, Mayor Harry escorted the first elected Queen of Rosaria, Queen Thelma, to visit the school children. It was interesting because Queen Thelma came as an older woman in the 1950s, which made for interesting conversations between Harry and Thelma. Thelma once talked about McDonald's restaurants, and Harry asked, "What is a hamburger?" A

little third grader approached him later and told him he needed to get out more. FYI, today, our grant pays for the princesses' food and transportation costs.

If you have a line item on the Foundation Financial Report you want to be explained in a future newsletter issue, please get in touch with Connie Shipley, Editor, or Bob Strader, Treasurer.

Donations received Oct. 16, 2022 - May 31, 2023

In honor of Gordon Torstenbo
Kathie Bagley
Connie Shipley

In honor of Jenny Kim
Connie Shipley

In honor of Stan Schmidt
Marilyn Schultz

In honor of Worth Caldwell
Connie Shipley

In honor of Joseph Catanese
Connie Shipley

In honor of Jane Anders
Kimberly Bown

In honor of Lynn Vancil
Tasha Johnson

In honor of Gordon Frasier, Gayle Whitehurst's brother-in-law
Kathie Bagley

Honoring Scott & Katherine
Rich & Charold Baer

Auction Special Appeal:
Greg McKelvey
Linda White

Dedicated Field Trip Grants:
Juan Young Trust
Susan Stauter
Karen Hofler

Dedicated Field Trip Grants, Washington County:
Reed and & Holly Fowler

Traveling Float
Royal Rosarians

The Closet/Clothing Sales
Kimberly Bown
Matthew Clark

Rose Garden Contest
Connie Shipley
Del Doellefeld
Patricia Salimena
Scott Stuhl
Kimberly Bown
Judith Ann Holmboe
E. David Granum
John Jackson
Mark & Lisa Sleasman
Ann Wrucke
John Linngren
Robert C. Bishop
John Danielson
Katherine Johnson
Cash (sale of Stake labels)
Marilyn Schultz
Chris Johnson
Ed Honeycutt
Ruth Takahashi
Barb Brennan
Kathy & David Fastenau
Gabriela M. Roman
Suzanne Day

General Donation:
Amazon
Fred Meyers
Barb Brennan
Cherrie Yohe
Mike Ware
Francis Bubenik/Donna Capodocqua
Network for Good – anonymous
Sally Henningsen
Harris Matarazzo
Kaiser Community Giving Campaign

Foundation's Investment Results

At the outset of the Foundation's Investment Committee meeting, Grant Kerger from Peregrine Asset Advisors did a quick recap of 2022, indicating rising inflation caused the Fed to change course and raise interest rates from zero to 4.5% by year-end. The results were the S&P fell 9.5%, Nasdaq was down 33.1%, and the sensitive bond market declined by 14.8%. Our portfolio during this time fell 13% in 2022.

The above percentages are the net decline as midway in November 2022, the market interest rates peaked for the year even though the Fed continued to raise the Federal Funds rate. This helped both the stock and bond markets reverse their downward trend, and our portfolio saw a 3.5% gain in Quarter 4 of 2022.

This sets the table for Quarter 1 of 2023, which turned out to be, as you will hear, a volatile quarter. Market interest rates continued to decline in January, which had a very positive result for the stock market. Unfortunately, in February, the markets took a step backward as rates began to creep higher and Quarter 4 earnings were released. The result was that all those nice gains in the previous month were lost.

However, in early March, interest rates reversed course to go lower. This again caused a surge in the market and recaptured much of what had been lost in February.

In looking at this quarter's report, the above resulted in a gain of 2.6%. It was confirmed during the meeting that while other portfolios had much larger gains, our modest gain was attributed to having approximately 30% of the account invested in Treasuries, for which we are receiving 4.5%.

Regarding our asset allocation, it remains in conformance with the Investment Policy Statement, as does the growth percentage since inception, which is 4.1%.

The committee then made no portfolio changes.

The gain and/or loss of our investments since the account's inception is not reflected in this report, as it only shows the information for one year.

After some investigation, I found that the account reached its zenith at the beginning of 2022 at $169,771. By subtracting the ending Quarter One value of $152,540 this results in a paper loss of -$17,231.

Sir Knight Gordon Walker
Investment Committee Chair

Consider including the Royal Rosarian Foundation in your Donation Planning

"Order of the Chalice"

$100,000+	King Richard's Champion
$50,000 - $99,999	Gallant of Gwenevere
$25,000 - $49,999	Order of Sir Lancelot
$10,000 - $24,999	Circle of Sir Galahad
$5,000 - $9,999	Robin Hood's Band

For more than a century, the Royal Rosarians have championed children's causes, the City of Portland, and the Portland Rose Festival. Could you help us keep our mission alive? This year, especially, your support is appreciated. Join those who have committed to include the Foundation in their financial planning:

Cathy Felder
Gayle Whitehurst
Scott Stuhl
Connie Shipley
Marilyn Schultz

The Royal Rosarian Foundation is a 501(c)(3) charitable organization.
(Tax ID # 93-1220495)

Community Rewards Programs

Have you considered a gift to your Royal Rosarian Foundation…one that will cost you nothing?
There are two companies the Royal Rosarian Foundation has partnered with to raise funds for the Foundation.

A new way that you can donate to the Royal Rosarian Foundation

With the recent demise of the Smile Amazon program the Royal Rosarian Foundation lost a funding source, but fear not, we have been diligent and have found a new and easy way that you can support the Foundation.

The BottleDrop program looks like a great and easy way to support your Royal Rosarian Foundation. Here is all that you need to do.

1. Get a blue bag and sticker from Duke Denny Baker.
2. Fill the bag with recyclable bottles and cans.
3. Tie the bag firmly.
4. Drop off your bag at a BottleDrop site (site locations can be found at BottleDrop Location Finder)
5. To deposit the bags, scan the QR code at the deposit site and put the bag inside.
6. That's it
7. TIME TO GET ANOTHER BLUE BAG

Fred Meyer.com/communityrewards:

Just sign up and Fred Meyer takes care of the rest.

In both cases, you are asked to select a charity. My hope is that you will choose the Royal Rosarian Foundation. It is easy to do, costs you nothing, and helps the Royal Rosarian Foundation aid the Rose Festival and the city of Portland.

Duke Denny Baker

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