



The Royal Rosarian Foundation Review

November 2022

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

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Editor:
Connie Shipley

The RR HeARTS and ROSES Auction Presents: Creating a Masterpiece. Feb. 25, 2023 - Doubletree Hotel



With the theme, "ARTS and ROSES," another in-person Rosarian auction is going to be a special event for the Royal Rosarians and the Royal Rosarian Foundation. We're looking forward to seeing many Rosarians and their non-Rosarian friends have a great evening as they support the Royal Rosarian Foundation.

Scheduled for the evening of February 25th, we will hold our Auction in the style we have enjoyed in the past while celebrating the Arts – with a caricature artist, Oral and Silent Auction items that will include artwork, the Paddle Raise, the Wine Wall, the Gift Card wall, and some new surprises to enjoy supporting the many programs of the Royal Rosarian Foundation.

Many parts of the auction are already in motion. Ian Lively will be back as the Auctioneer this year. Whites will be the dress for the evening. Guests can come to the event in cocktail party attire.

We'd love to expand the number of Rosarians on the Auction committee. Michelle Veentjer will receive all the donated items. Alan Hoekendorf, Kimberly Bown, Sue Simpson and Holly Morgan are in charge of Silent Auction items. Scott Stuhl is in charge of the Wine Wall, Sue Simpson will handle Dinner Packages, and Kimberly Bown is in charge of the gift certificate wall. If you would like to be a part of the creation of this important fundraiser for the Royal Rosarian Foundation, please reach out to me. We have areas where we can use more hands in building the event.

Be ready to register for the event on the Rosarian website. You will find information about the night and a donation form you can download and fill out for your donation. We are also asking everyone to make a donation and get one donation. Let me know how you can help.

We're looking forward to seeing you and your friends at the event on February 25th, for our "Arts and Roses" auction! This will be an opportunity to have fun and support the Foundation at the same time.

Michelle Veentjer
2023 Auction Co-Chair

President's Message



Thank you for giving me the opportunity to lead the Royal Rosarian Foundation. I have been on the Foundation for many years and believe we have a great board of directors and officers. Everyone in the Royal Rosarians is also a member of the Foundation. We meet the fourth Wednesday of each month at the Lloyd Center Double Tree by Hilton in the Portland Room at 6:00 pm. and all Royal Rosarians are invited to attend.

Our only real fundraiser is the auction that is on February 25th at the Lloyd Center Double Tree by Hilton. Once again Michelle Veentjer is the Council and chairperson of this event and I know she will do a fantastic job. Please plan on attending or making a donation to the auction. 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 and the other half involves the Traveling float and the Grand Floral Parade Float. This is required through the Memorandum of Understanding (MOU) between the Royal Rosarians and the Rose Festival Foundation.

This year Gary Stenberg is designing our float as he did last year. I believe we would all agree this was the best float that we have had in the Grand Floral Parade in many years. Gary and Carla did a great on the design and building of the float. They will also be 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

Traveling Float



After many years of good service representing the Rosarians, it is time for our current traveling float to be put out to pasture!

Sir Knight John Jackson along with many Rosarian volunteers designed and built our current float using a new truck chassis donated by Dame Roz Vancil in memory of Squire Lynn and his love for the Rosarians.

After spending hundreds of volunteer hours crafting our current Traveling Float, this float was featured in many local and out-of-town parades supporting the City of Portland and Royal Rosarian Foundation. The Foundation and all Rosarians thank John and his volunteers for their time and dedication to the Royal Rosarians!

Working with Squire Gary and Dame Carla Stenberg, owners of Rose City Float Designs, LLC, we are proud to present our next Traveling Float. This float's design incorporates many new features highlighting the City of Portland, The Rosarians, and The Royal Rosarian Foundation. Our goal in this design is to invite and welcome visitors to the Portland area while at the same time promoting The Portland Royal Rosarians and Foundation.

The basic design and structure should be able to accommodate our needs for 7-10 years while enabling us to change out flowers, overall color, and seating to update its look on an annual basis at minimal cost while creating a new look every year.

Beginning in November we will disassemble the current float at our storage facility and then Rose City Float Designs will pick up the chassis and deliver our new float in time for the 2023 Festival Season.

Mike Ware
Lord High Chancellor

Queens' Garden Party



Committee Members of the 2022 Queens' Garden Party.....

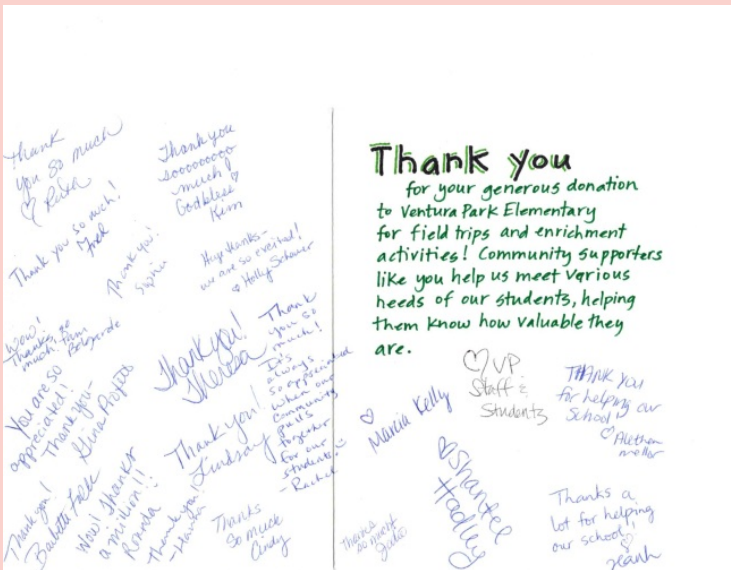
I would like to take this opportunity to **Thank Everyone** who worked at the 2022 Queens' Garden Party. You did a tremendous job and because of all your efforts, we were successful! I appreciate all your hard work and perseverance!

Every year I am totally amazed at how wonderfully smooth the Queens' Garden Party runs. It's not due to anything I have done, but the efforts of my **Committee Chairs!**

Once again you have gone above and beyond your duties and have done a wonderful job...
Again, Thank YOU!

Dame Katherine Johnson
Queens' Garden Party Chair

Field Trip Program



The Field Trip Project for the 2021-2022 school year resulted in at least 6,000 students benefiting from a field trip program or taking part in a special education project.

Michael Contreras, principal of Ron Russell Middle School, advised that the funds they received were used in different ways. From a school garden being used

as an outdoor classroom space, where some of the money was used for seeds, soil, and tools to students competing in a nationwide program where the students read books and competed in a quiz bowl style form. Their team, led by their library assistant, competed against other teams nationally, representing the school, and had a great time. They also held a last hurrah for their departing 8th graders in an 8th Grade Celebration. Also, this year they had a field day where students stayed on campus with activities like a dunk tank, bouncy house, and henna tattoos - a great way for all the students to end the school year. Mr. Contreras is grateful for the partnership we have created and looks forward to continuing our work together.

At Ventura Park Elementary School, the 1st graders took part in a Virtual Field

Trip, with a Children's Theater blend of hip-hop, Motown, gospel, and rap. The 4th graders went to the Children's Court at Campbell Course in Gladstone, home to the First Tee, on May 27th where they were treated to a clinic to introduce many to the game of golf. They learned four types of shots: putting, chipping, pitching, and full swing.

The Hayhurst Elementary principal's school secretary, Kathy Lee, reported they purchased several boxes of outstanding books for the library. Everyone at school wins with this wonderful gift.

Thanks to the successful Auction last February and a \$10,000 grant from the Juan Young Trust, the committee is working on the 2022-23 year budget. Thank you for helping to make the Auction so successful.

Dame Connie Shipley

Community Transitional School



Community Transitional School Thanksgiving Feast

Roasted turkey with cranberry sauce, bread stuffing, mashed potatoes and gravy, yams, green beans, and pumpkin pie topped by whipped cream. Sounds like a regular Thanksgiving dinner, right?

But this menu is for a very special meal – the annual Thanksgiving Feast, prepared by the pupils at the Community Transitional School as a way to thank their donors and volunteers. Always held at noon on the day before the holiday, this year's event will be attended by several Rosarians representing our Foundation.

In addition to preparing the food, the children will act as hosts and hostesses and be seated with the guests. The older students (6th – 8th grade) will also present a brief program. The entire exercise is designed to teach these homeless children some practical skills and build their self-confidence. And it is the only Thanksgiving dinner many of them will have.

As mentioned earlier this week in the Royal Update, Marilyn Schultz is hosting an Open House for the Community Transitional School where people can bring supplies for the school, new clothes, or a check made out to the Community Transitional School.

When: December 17, 2022, 3:00 pm - 7:00 pm

Where: 2423 Remington Drive, West Linn, OR 97068

Attire: Come as you are.

If you want to contribute something to CTS and can't attend Marilyn's party, you can drop off your donation at the Auction item drop-off event in December. Look for the date, time, and location in a future Tuesday Report.

Duchess Marilyn Schultz

Financial Report

At the October meeting the 2022-2023 Foundation budget was approved.

Royal Rosarian Foundation Approved Budget For the Period Ending September 30, 2023

Expense	Prior Yr.	Current Yr.	Approved
	2021	2022	2023
	Actual	Actual	
6000 · Administrative Expenses			
6100 · Accounting Fees	911	739	900
6300 · Insurance	4,774	5,131	5,200
6400 · Office Supplies	29	270	0
6500 · Postage	263	474	400
6600 · Printing	411	102	0
6800 · Taxes & Fees	256	167	175
6900 · Website	434	144	1,000
Total 6000 · Administrative Expenses	7,078	7,027	7,675
7050 · Traveling Float Costs			
4775 · Decorating Expense	545	534	14,000
4777 · Operating Expense	1,624	5,654	8,000
4778 · Repairs & Maintenance	1,081	1,413	1,000
Total 7050 · Traveling Float Costs	3,250	7,601	23,000 24%
7100 · Community Spirit			
4757 · Rose Garden Contest Expenses	1,847	1,884	2,000
7102 · Grand Floral Parade Float	905	36,367	24,700
7103 · Grand Floral Bus & Flowers	0	208	250
7104 · Queens' Garden Party	1,000	1,000	1,000
7106 · PRFF Auction Sponsorship	500	0	500
7108 · PRFF Honors Sponsorship	0	500	500
7110 · Rose Garden Statue	0	0	3,000
Total 7100 · Community Spirit	4,252	39,959	31,950 34%
7200 · Philanthropic Giving			
7204 · Field Trip Grants	22,548	21,154	25,003
7206 · Christmas for Kids	2,000	5,000	0
7208 · Sister City Associations	0	0	500
7210 · Community Transitional School	7,000	7,000	7,000
7212 · PRFF Court Outreach	5,000	5,000	5,000
7214 · Ethos Music Center	5,000	5,000	0
7290 · Grants not budgeted	700	875	2,000
Total 7200 · Philanthropic Giving	42,248	44,029	39,503 42%
Total Expense	56,828	98,616	102,128
Net Income	19,858	(5,206)	(30,628) to (\$10,628)

10/25/22
Accrual Basis

Royal Rosarian Foundation
Balance Sheet
As of September 30, 2022

	Sep 30, 22	Sep 30, 21
ASSETS		
Current Assets		
Checking/Savings		
1000 - Checking - Key Bank	102,603.08	108,984.29
1050 - Direct Depository - Key Bank	2,191.21	1,967.32
Total Checking/Savings	104,794.29	110,951.61
Total Current Assets	104,794.29	110,951.61
Fixed Assets		
1801 - Grand Floral Parade Chassis	10,000.00	10,000.00
1802 - Traveling Float Chassis	1,000.00	1,000.00
1803 - Traveling Float Trailer	1,000.00	1,000.00
1851 - Accumulated Depreciation	-12,000.00	-12,000.00
Total Fixed Assets	0.00	0.00
Other Assets		
1260 - Fidelity Investments	143,596.38	163,276.01
Total Other Assets	143,596.38	163,276.01
TOTAL ASSETS	248,390.67	274,227.62
LIABILITIES & EQUITY		
Equity		
3110 - Endowment	15,000.00	15,000.00
3160 - Dedicated Field Trips		
3161 - Portland Metro	45,091.20	51,264.00
3162 - Washington County	2,491.00	6,972.00
Total 3160 - Dedicated Field Trips	47,582.20	58,236.00
3190 - Dedicated At Risk Programs	34,560.00	0.00
3200 - Unrestricted	177,085.42	166,069.72
Net Income	-25,836.95	34,921.90
Total Equity	248,390.67	274,227.62
TOTAL LIABILITIES & EQUITY	248,390.67	274,227.62

Royal Rosarian Foundation
Profit & Loss Statement
For the Period Ending September 30, 2022

	Aug. 24 Sept 30	12 Months YTD	Annual Budget
Ordinary Income/Expense			
Income			
4000 · Fundraising Income			
Donations			
4133 · Unrestricted Donations			
4134 · Rosarian with dues	0	180	
4135 · Life Member in-lieu of dues	0	500	
4136 · Memorial Contributions	50	2,085	
4137 · Donations - Fred Meyer	78	292	
4138 · Donations - Amazon Smile	65	224	
4139 · The Closet/Clothing Sales	520	872	
4133 · Unrestricted Donations - Other	4,677	8,897	
Total 4133 · Unrestricted Donations	<u>5,390</u>	<u>13,050</u>	0
4753 · Rose Garden Contest	0	1,445	
7201 · Dedicated Field Trips	0	10,500	
Total Donations	<u>5,390</u>	<u>24,995</u>	0
Auction			
Auction Revenue			
4152 · Registrations	0	250	
4153 · Donations & Other Pre-sales	0	4,025	
4154 · Greater Giving Deposits	0	77,597	
4156 · Paddle Raise - Restricted	0	34,560	
Total Auction Revenue	<u>0</u>	<u>116,432</u>	0
Auction Expenses			
4168 · Auction Cash Expenses	0	(46,207)	
4170 · Greater Giving & Internet Fees	0	(1,810)	
Total Auction Expenses	<u>0</u>	<u>(48,017)</u>	0
Net Auction Revenue	<u>0</u>	<u>68,416</u>	0
Total 4000 · Fundraising Income	<u>5,390</u>	<u>93,410</u>	0
Expense			
6000 · Administrative Expenses			
6100 · Accounting Fees	0	739	900
6300 · Insurance	0	5,131	5,000
6400 · Office Supplies	0	270	0
6500 · Postage	150	474	300
6600 · Printing	31	102	400
6800 · Taxes & Fees	0	167	200
6900 · Website	0	144	200
Total 6000 · Administrative Expenses	<u>181</u>	<u>7,027</u>	7,000

Royal Rosarian Foundation
Profit & Loss Statement
For the Period Ending September 30, 2022

	Aug. 24 Sept 30	12 Months YTD	Annual Budget
7050 · Traveling Float Costs			
4775 · Decorating Expense	0	534	300
4777 · Operating Expense	1,166	5,654	11,000
4778 · Repairs & Maintenance	863	1,413	700
Total 7050 · Traveling Float Costs	<u>2,029</u>	<u>7,601</u>	<u>12,000</u>
7100 · Community Spirit			
4757 · Rose Garden Contest Expenses	0	1,884	2,000
7102 · Grand Floral Parade Float	0	36,367	45,500
7103 · Grand Floral Bus & Flowers	0	208	500
7104 · Queens' Garden Party	0	1,000	1,000
7106 · PRFF Auction Sponsorship	0	0	500
7108 · PRFF Honors Sponsorship	0	500	500
Total 7100 · Community Spirit	<u>0</u>	<u>39,959</u>	<u>50,000</u>
7200 · Philanthropic Giving			
7204 · Field Trip Grants	(180)	21,154	21,000
7206 · Christmas for Kids	0	5,000	5,000
7208 · Sister City Associations	0	0	500
7210 · Community Transitional School	0	7,000	7,000
7212 · PRFF Court Outreach	0	5,000	5,000
7214 · Ethos Music Center	0	5,000	5,000
7290 · Grants not budgeted	0	875	500
Total 7200 · Philanthropic Giving	<u>(180)</u>	<u>44,029</u>	<u>44,000</u>
Total Expense	<u>2,031</u>	<u>98,616</u>	<u>113,000</u>
Net Ordinary Income	3,359	(5,206)	(113,000)
Other Income/Expense			
Other Income			
Investment Income			
4637 · Gains and Losses	(8,339)	(20,631)	0
Total Investment Income	<u>(8,339)</u>	<u>(20,631)</u>	<u>0</u>
Total Other Income	<u>(8,339)</u>	<u>(20,631)</u>	<u>0</u>
Net Other Income	<u>(8,339)</u>	<u>(20,631)</u>	<u>0</u>
Net Income	<u>(4,980)</u>	<u>(25,837)</u>	<u>(113,000)</u>

Donations received through Nov 10, 2022

In honor of Amie Abbott

Connie Shipley

In honor of Neal Brown

Marilyn Schultz

In honor of Dan Correll

Connie Shipley

In honor of Worth Caldwell

Tom & Shirley Sagerer

In honor of Gordon Torstenbo

Kathie Bagley

Marilyn Schultz

Connie Shipley

Field Trip Project:

Juan Young Trust

General Donation:

Anonymous

Barb Brennan

Don & Shari Brown

Tom & Mary Jenkins

Kroger-Fred Meyer

Rick Miller - Clothing

Special Appeal:

Dennis & Harlene Austin

Karen Dervedde

Janece Herzog

Ed Honeycutt

Katherine Johnson

E. David Granum & Joann

Klassen

John Linngren

Jeffery & Grace Mandel

Tom Marantette

Greg McKelvey

Neil Nathanson

Carolyn & Dan O'Doherty

Eric Rosenfeld

Patricia Salimena

Fran Searce

Connie Shipley

Suzanne Seida

Ruth Takahashi

Foundation's Investment Results

3rd Quarter Report To The Royal Rosarian Foundation Board

In reviewing the Reports from Peregrine, we see another negative quarter; however, at approximately \$3,300, not as much as the \$14,000 + loss we incurred in the second quarter. Also, the objective percentage profit increase has dropped below the goal of 4%, but only by 4 tenths of a percent to 3.6%. Certainly not any problem with our Asset Allocation exceeding the guidelines.

On the somewhat bright side as this is not a prediction, but simply a positive result on what the value of the account is today which is approximately \$146,500, which is close to what our beginning value was for the beginning to the 3rd quarter.

Now onto yesterday's Investment Committee meeting. Of course, much discussion about the market with our Investment Advisor, Dan Botti. He indicated that 2022 has eclipsed what he expected regarding the rise in interest rates and the downside of fixed income. Dan also indicated that if someone had asked him to make a prediction, he would not have predicted it could get this bad.

Dan was asked about his remark in his email about the favored course for us is to position ourselves with as much resilience as possible and whether we needed to make any changes to accomplish this. Dan indicated that our present holdings accomplished this except for making 1 change.

That is, we have a hybrid investment in Fidelity Puritan which consists of both stocks and bonds. He is recommending that we sell this and invest the results in an S & P Fund, which is an equity fund. After discussion, the committee approved this change.

Regarding the Treasury Bills, these mature tomorrow and they will be renewed this time at a higher interest rate of between 4 and 4 ¼ %.

Sir Knight Gordon Walker
Investment Committee Chair

New Members of the Order of the Chalice Recognized



Three new members of the Order of the Chalice were honored at the November membership meeting. Scott Stuhl, Connie Shipley, and Marilyn Schultz received certificates recognizing their pledge to contribute to the Rosarian Foundation through their estate planning. Early trailblazers of the program were Gayle and Ed Whitehurst and Cathy Felder. Cathy was present at the

November meeting and is pictured with the newest Chalice members.

The Order of the Chalice, a legacy gift program, was created by Rosarians about 15 years ago to provide for the continuation of good works from our Royal Rosarian Foundation for generations to come. The idea was that one day we would have an endowment large enough so that we would no longer have to hold fundraisers, but we could finance our charitable projects with the earnings the endowment generated.

This is an ambitious plan, and achieving it will require many large gifts and a considerable period of time. But, as with many great accomplishments, success begins with a single step.

More Rosarians could receive similar recognition by listing the Royal Rosarian Foundation, a 501(c)(3) charitable organization, as a beneficiary in their wills or life insurance policies. The Foundation also accepts gifts of cash or stock or real property.

These kinds of significant donations will create a lasting legacy in the name of the donors, as well as benefit our Foundation's worthy causes and preserve our wonderful Rosarian traditions. Please contact a Foundation Board member for more information.

Dame Marilyn Schultz

The Royal Rosarian Foundation is a 501(c)(3) charitable organization.

Clothes Closet is looking for a new home

The Clothes Closet is a fundraising activity of the Foundation and provides Rosarians the opportunity to purchase slightly used Rosarian clothing. After hosting the Clothes Closet at her home for several years, Kathie Bagley has asked for someone else to assume this responsibility.

The Clothes Closet host will accept donated items and make them available to other Rosarians who are interested in purchasing them. The inventory requires space for four single racks and one double rack.

If someone is interested or needs more information, please call Kathie Bagley.
Dame Connie Shipley

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 that will donate a percentage of the purchases to the Royal Rosarian Foundation.

They are:



Go to AMAZON SMILE to order. Same products, same prices, just some needed \$ for the Foundation.

All you need to do is go to Amazon Smile and sign up. It is free of charge, so no obligation to you. Once signed up, all you need to do when you order is to be sure to go to **AMAZON SMILE** to order. Same products, same prices, just some needed \$ for the Foundation.

Fred Meyer.com/communityrewards:
Just sign up and Fred Meyer takes care of the rest.



In both cases, you will be 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

Portland, OR 97207-8956
www.RoyalRosarianFoundation.org

