

2022
ANNUAL
REPORT

difference
MAKERS

“

I alone can't change the world, but
I can cast a stone across the waters
to *create many ripples.*

— Mother Teresa

BOARD of DIRECTORS

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Keri Bruegger,
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Dear friends,

We are excited to share the Caring Forever Foundation's year-in-review with you! Your faithful support has made all this possible.

Together in 2022, we were *difference makers*—creating ripples of positive impact throughout our community.

As the supporting organization of Memorial Drive United Methodist Church, the Caring Forever Foundation shares the church's mission to make disciples of Jesus. All grants from the Foundation helped further this mission. Foundation grants directly bolstered church programming, aided church members, and empowered community organizations.

On the following pages you'll see pictures and read more about how the Foundation made a difference in our church and community. We couldn't have done it without you, and we look forward to continuing this work for many years to come.

Peace,

Mike Baker
Board Chair



Stacy Brock Stepler
Executive Director





*The purpose
of the
Caring
Forever
Foundation
is to...*

1.
ENCOURAGE
THOUGHTFUL
GIVING

There are several ways to support the work of the Foundation:

Join the Caring Forever Patrons to help underwrite annual operating costs.

Give a memorial or honorarium to recognize a loved one.

Make a planned gift and join the H. Eugene Cragg Legacy Circle.

2.
AWARD GRANTS
& SCHOLARSHIPS

The Foundation awarded \$124,751 in grants and scholarships in 2022.

Foundation grants support ministries, missions, and programs of MDUMC, as well as many impactful organizations in our community and around the world.

The Foundation also awards scholarships to support students who are pursuing higher education.

3. MAINTAIN THE MEMORIAL GARDEN

On the east side of the church courtyard is the final resting place for the cremated remains of members and loved ones. The Memorial Garden offers a quiet, comforting space to draw close to God, to give thanks, and to remember. Niches in the columbarium are available for church members and their immediate family.

The *Caring Forever Foundation* is the 501c3 supporting organization of Memorial Drive United Methodist Church established in 1999 exclusively for charitable, religious, and educational purposes. The Foundation receives gifts and administers them for the perpetual benefit of the Church's ministries and missions.

Gifts are made to, and grants are awarded from the Foundation's 12 funds (in alphabetical order):

General Fund

Ben Bogart Youth Scholarship

Beverly Sloan Landscaping

Bobbie Swaim Traditional Music

Bonita Ranzau Scholarship

Charles B. Simmons Mission Scholarship

H. Eugene Cragg Ministerial Scholarship

Harry Rankin Lectures

Helping Hands

Howard Swaim Media

Memorial Garden

Porter Fund for Religious Education



“What you do makes a difference, and you have to decide what *kind of difference* you want to make.

— Jane Goodall

2022
*Foundation
Donors*

**CFF Patrons*

John & Robbie Adams
Charles Alaimo
Ken & Patty Albers*
Deana Anderson
Audrey Angel
Chip & Kristin Anthony*

Lee Appleberry & Tanya Tullos
Brenda Auld
John & Cheryl Aven*
Mike Baker*
Nancy Sue Bammel*
John & Rosemarie Baugher
Susan Bettencourt
Alan & Bernadine Billard

Andrew Bouffard
Barbara Bozeman
Mary Brannies*
Judy Brewer
Trish Brice*
Frank Busch*
George & Peg Byers*
Valerie Byrd

thank you to our donors!

1

We encourage THOUGHTFUL GIVING



LEARN MORE OR
MAKE A GIFT
mdumc.org/eff

BECOME A PATRON

Caring Forever Foundation Patrons help underwrite the annual operating costs of the Foundation, thus directly increasing the dollars we can distribute to ministries and programs at MDUMC and throughout the Houston community. Join the Patrons to partner with us in this life-giving work.

MAKE A DONATION IN MEMORY OF OR IN HONOR OF SOMEONE SPECIAL TO YOU

You may recognize someone by giving to one of our 12 existing funds (*listed on p. 5*) or set up a brand new fund for a minimum contribution of \$100,000 or a new scholarship with \$10,000 or more.

ESTABLISH A PLANNED GIFT

The H. Eugene Cragg Legacy Circle recognizes and says thank you in advance to those who have planned gifts to the Caring Forever Foundation through their estates. Estate gifts to the Foundation make the biggest impact on growing the endowment. And as the endowment grows, the Foundation can do more for MDUMC and the greater community. Donors may choose to make the Foundation a beneficiary of assets from these sources: bequests from wills or trusts, retirement accounts, life insurance, donor advised fund, or private foundation. Contact us for more details.

Norm & Margaret Carlson*
Louis & Sharyn Carpenter*
Beth Carroll
Carter & Hatcher Consulting
Hope Causey
Central Baptist Church
Richard Chiburis
Charlie & Gail Cline

David Collins
John & Sherry Collins
Richard Collyer
Carol Ann Cornette
Chris & Marli Couch
John & Sandy Countzler
Julie Cowart
Tracy Coy

Karen Crager
Steve & Beverly Cragg
Chris & Lauri Cragg*
Gene & Nell Cragg
Linda Cullen
Sheridan DeGrace
Danny & Susan Draughon*
Julie Eisenhauer*

Gerry & Kim Elphinstone*
Drew & Kristen Essen*
The Estate of
Eleanore Kenyon
Matt & Cimarron Evans*
Eldon & Eileen Fankhauser
Anne Farella
Marilyn Farr*

Jane Fieldcamp*
Diane Fowler
Debbie Fralix*
John & Becky French
Linda Garner
Tom & Jeanene Gay
Caro Ann Germann
Ann Gibbs

Glenn & Carma Gibler
Cyd Gillette
Good News Sunday
School Class
Roxane Graff
Janice Grant
Dick & Norma Graves*

donors continued on p. 10



2 We award GRANTS & SCHOLARSHIPS

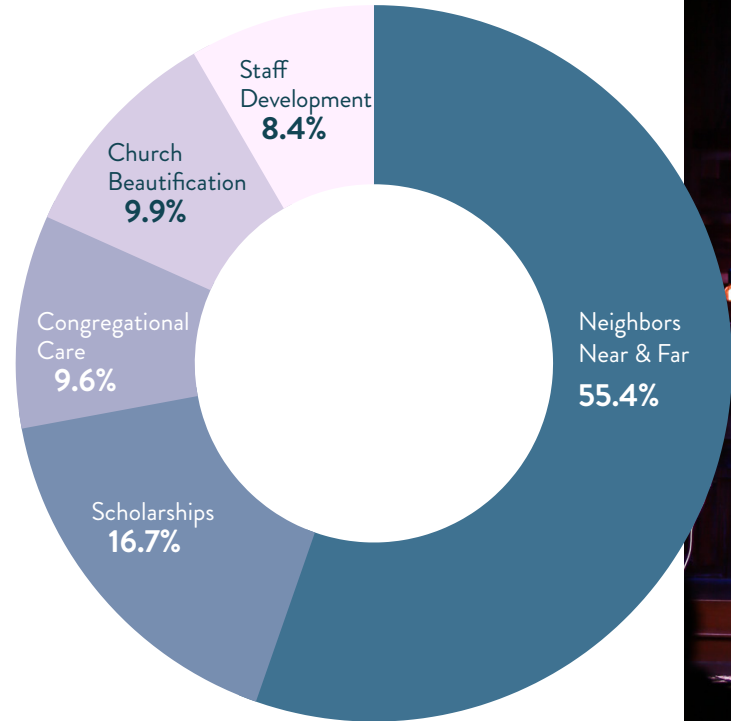
NEW THIS YEAR! Check-In For Change \$8,402 | We are a better church when we know who worships with us and this grant encouraged church members to register their attendance each week in worship. Starting in August 2022, for every family unit that registered their attendance, the church donated an extra dollar to a community organization. The charities were FAM Houston, Memorial Area Assistance Ministries, The United Methodist Committee on Relief, the East Spring Branch Food Pantry, and House of Amos.

MDUMC Pastors' Discretionary Fund \$12,000 | Each year a grant from the Helping Hands Fund supports MDUMC's Pastors' Discretionary Fund which is used to help those in our congregation with unexpected needs. The fund allows the pastors to act quickly to make a difference in the lives of those in need.

Staff Retreat \$5,000 | The MDUMC staff leadership took a two-night retreat to Camp Allen where they learned the results of their Birkman Assessment and how to apply this information to work together more effectively as a staff. They also enjoyed a scavenger hunt, amenities of Camp Allen, and worship time together.

Executive Team Coaching \$5,460 | The executive team will receive team and individual coaching from Rev. Leo Tyler to help improve time management, communication and leadership skills.

Church Beautification \$12,367 | The Beverly Sloan fund provided for seasonal flowers to maintain our beautiful and welcoming church grounds.



\$124,751
*in grants and scholarships
from the Foundation*





Seminary Loan Repayment

\$8,314 | In recognition of our valuable clergy, the Foundation helped Michael Jarboe repay a portion of his student loans, allowing him to focus on his work and ministry at MDUMC.

NEW THIS YEAR! BONITA RANZAU SCHOLARSHIP

\$7,500 | An estate gift allowed the Foundation to award our first-ever Bonita Ranzau Scholarships in 2022. We awarded scholarships to three students: Stephen Cho, Taylor Dibrell, and Samantha de la Moriniere. This scholarship will be awarded each year to students who have completed at least one year of college.



Stephen Cho
Senior, University of Texas; Business



Taylor Dibrell
Junior, Indiana University at Bloomington; Music



“

The Bonita Ranzau scholarship was such an amazing blessing and helped me immensely in my schooling. MDUMC has brought me many gifts including an amazing community, a closer relationship with God, as well as a peace of mind when it comes to acquiring my education. I feel so honored to have been chosen and feel so fortunate to have a chosen family in MDUMC!

—**Samantha de la Moriniere** | Sophomore, Texas A&M University and Blinn College; Business

Clayton Bouwhuis
Freshman, University of Texas; Business



Youth Scholarship **\$3,500**

This scholarship, partially funded by the Ben Bogart Youth Scholarship Fund, supported one of our youth graduates, Clayton Bouwhuis, during his first year at UT.



Caroline Stone
MDUMC High School Ministry Coordinator

Perkins Tuition

\$1,070 | The Foundation supported the seminary tuition for Caroline Stone, MDUMC youth staff, to further her education at SMU's Perkins School of Theology to improve the quality of our youth programming.



Neighbors in Action \$5,000

A foundation grant supported Neighbors in Action's Monday children's program, La Conexion Jr., which is a combination of Bible studies, crafts, special guest speakers, and service projects for ages 4–8 years old. This program is held during the school year.



We are so grateful for the support of the Caring Forever Foundation in our after-school program that serves 32 elementary students in SBISD to provide them with intentional, meaningful educational activities and healthy snacks through the grant to cover our materials and food for the 2022–23 school year!

—Amanda Etheredge, Cornerstone Family Ministries

Cornerstone Family Ministries \$8,300 | A Foundation grant allowed Cornerstone Family Ministries to purchase healthy snacks and supplies for their afterschool program for SBISD elementary students north of I-10.

NewSpring \$12,338

A grant supported art enrichment for underserved/under-resourced Spring Branch students at Gracewood and Cedar Brook Elementary one day a week. Funding provided teacher compensation, curriculum, and art supplies.



Kids' Meals \$6,000

A grant to Kids' Meals helped feed thousands of children across Houston. Specifically, the Foundation's grant provided the plastic baggies needed to pack the lunches during the last quarter of 2022.

Walt Gray
Sue Greene*
Dennis Gregg
Pat & Anita Grimes
Deborah Ham*
Robert Hamilton
David & Jennifer Hammer*
Chris & LaJeana Hardig

Jim & Joan Harrison*
Blake & T.K. Harrison*
Thomas & Stephanie Hatfield*
Wendy Hauser
Bernadette Heintz
Lida Herring
Doyle & Cindy Hickok
Ken & Sandra Hicks

Chris & Kay Hilberth*
Keith Hnatowsky
Beryl Hogshead
Henry & Betsy Hope*
William & Janet Hopkins
Hal & Susan Howes
Jennifer Hudd*
Lauren Hughes

Tara Hunsucker*
Robert & Sylvia Hutson
Jim & Barbara Isbell
Lynda Jackson*
Charles & Linda Jenkins
Randy John*
DeAndre & Kelsey Johnson*
Brian & Phoebe Katterhenry*

Tom & Janet Kennedy
Kim & Lynell Kennedy*
David Schultz
& Monica Kervandjian*
Colton & Olivia Key
Donna Kidwell
Louise Kiel*
Bill & Linda Kimball*

Kandice Kirby
Barbara Knight
Jessie Koci
Graham Kullman
Lakeside Womens Club
William Landrum
James Lane
Blaine & Katharine Larson*



Family Point Resources \$5,000

A grant supported sports, arts, and education after-school enrichment programs, for K-12 students. Through FPR children can register for sports, get help with homework, attend arts clubs, and prepare for college.

Mark & Diane Lund
George Maness
Harlon & Karen Martin*
Mary Lu Mase*
Jan Massaro
Angela Matula
Maria McAnulty
Brian & Deana McElroy

Scott & Katherine McKnight*
Blake & Larissa McLean*
Harry McLeod
Andrea McNally
Tom McNeish
Jim & Janie McPhail
Jereld McQueen
Sally Mercer

Andy & Sara Merryman
David & Katie Miller*
Joanne Miller
Virginia Moerbe
Ginger Montgomery
Jack & Debbie Moore*
Brad & Laura Morgan*
Galt & Shirley Morgan*

Linda Morgan
Tom & Judy Morgan*
Jeremy & Erin Moss*
National Christian
Foundation Houston
Scott & Carol Neal*
Greg & Libbie Nelson*
Greg & Lisa Nelson*

Linda Niemi
Gary & Joy Noble*
Rita Olufowoshe
Chris & MaryAnn Parker
Robert Paschal
Brian & Michelle Payne*
Carole Payne*
George & Peggy Pendleton

Robbie Perry
Jim & Christie Petrie*
James Petruzzi
Pledgeling Foundation
Watson & Kate Potter*
Ruth Nell Powers
Probers Class

donors continued on p. 14



The Caring Forever Foundation graciously supported me on a mission trip to Honduras during the spring of 2022. Because of this generosity, I was able to help lead a team of four in serving hundreds of children in Potrerillos, Honduras.

Without the support of the CFF it would have been much more difficult for me to make this trip. With the help of CFF, I was able to reach a very underserved community. This generosity has sparked further interest for our MDUMC community to continue engaging with this region. I am grateful to the CFF for their ongoing commitment to mission work!

—Lauren Bedevian
Recipient, Honduras Mission Scholarship



**Honduras Mission Scholarship
\$500** | The Foundation supported Lauren Bedevian (church member and MDUMC Associate Director of Children's Ministry) on a mission trip to Honduras. Each year, she visits the same village to help with Vacation Bible School.



**Honduras Mission Trip
\$3,000** | This grant will help to start a partnership between MDUMC and St. Luke-Simpson UMC for an annual mission trip to support a Vacation Bible School for children and provide dental services.



NEW THIS YEAR!**Galveston Housing Plus**

\$10,000 | This new organization, started by two Methodist churches in Galveston, recently purchased an old UTMB dorm to provide housing for the homeless. A Foundation grant allowed them to make the outdoor space useable, making an immediate difference in their ability to provide housing, as well as showing broad-based and connectional support for their efforts.

House of Amos

\$6,000 | A grant supported funding toiletries for Alief families in need—for ESL classes, and funding for families needing help with rent and utilities. An additional grant helped the House of Amos provide Christmas gifts for the children of their families.



“

Alone, none of us can change the world. But every time we act in faith, stand up for an ideal, fight against injustice, or help someone in need, we create ripples of hope. Together, these ripples become mighty waves that have the power to transform lives and our community.

Just a few years ago, Memorial Assistance Ministries (MAM) launched Pathways for Young Adults, a program offering career and educational guidance and support to local youth. Support from the Caring Forever Foundation has enabled MAM to grow the program and make this truly life-changing opportunity available to nearly 500 youth in 2022! Together, we provide a unique opportunity for local youth to discover their innate talents, passion, and potential, and build a pathway to a positive future. Last year, 117 young adults secured jobs and 33 completed healthcare related vocational training. This would not have been possible without you!

We are so grateful for the 40 years of partnership with MDUMC and your generous support of our mission to build stable families, a dynamic workforce, and vibrant communities... together!

—Sonja Gee, President & CEO,
Memorial Assistance Ministries (MAM)

Memorial Assistance Ministries \$5,000

The Foundation supported MAM's Pathways for Young Adults program to educate and motivate young people to develop positive work attitudes. The program connects teens and young adults to social support and a tailored employment assistance program.



3

We maintain

THE MEMORIAL GARDEN

On the east side of the church courtyard is the final resting place for the cremated remains of members and loved ones.

The Memorial Garden offers a quiet, comforting space to draw close to God, to give thanks, and to remember. On either side of the space is a columbarium with niches held in a polished wall of granite engraved with personal markers for the deceased. Each niche has been entrusted to the perpetual care of Memorial Drive UMC and is the responsibility of the Caring Forever Foundation.

If you are a church member desiring to learn more about purchasing inurnment rights in the Memorial Garden, contact the CFF office at (713) 468-8356 ext. 241. Niches are available for \$2,700 per person.



“
Do not neglect to
do good and share
what you have
for such sacrifices
are pleasing to God.

— Hebrews 13:16

STATEMENT OF FINANCIAL POSITION

ASSETS & LIABILITIES	2022	2021	VARIANCE
Assets			
Cash & Cash Equivalents	\$97,179	\$83,321	\$13,858
Investments	5,978,820	7,135,339	(1,156,519)
TOTAL ASSETS	\$6,075,999	\$7,218,660	(\$1,142,661)
Total Liabilities	-	\$169	(\$169)
Net Assets			
Without Donor Restriction	\$3,195,758	\$3,731,439	(\$535,681)
With Donor Restriction	2,880,241	3,487,052	(606,811)
Total Net Assets	\$6,075,999	\$7,218,491	(\$1,142,492)
TOTAL LIABILITIES & NET ASSETS	\$6,075,999	\$7,218,660	(\$1,142,661)

Bill & Nancy Rawl
Lee & Cindy Ray
Sandra Redd
Allen Redding &
Jane Erskine Redding*
Allan Reece
Landy Reed
Thomas Reif

Craig & Kathy Rench*
Jamie Rhea
Brad & Amy Richards*
Ross & Krystal Robinson*
Nancy Rodenbusch
Susan Rosenbaum
Patricia Rowland
Janice Rubin*

Billie Sanderson
Carolyn Saul*
Judy Scarborough
Robin Schrimpf
Hettie Schultz
Nellie Sciutto
Stephanie Shahid
Greg & Beth Shaw*

Will & Jacqueline Shumate
Chuck & Carol Simmons
Jeff & Jenny Simmons*
Sonya Skaggs
Lois Smith
Harry & Suzanne Smith*
Phillip Smith
Reid Smith

Don & Virginia Smith
Ryan & Stacy Stepler*
Robin Tacquard
Claire Tapscott
Tom & Leah Taylor
The Greater Houston
Airstream Club
The Sweet Family Fund

Brian & Lynn Thomas
Art & Carolyn Thompson*
John & Liz Thornton*
Roy Thornton
Jack Threet
Jeanette Tyer
Scott Underwood
Balaam & Erin Valdez*

STATEMENT OF ACTIVITIES

REVENUES	2022	2021	VARIANCE
Donor & Other Support			
Contributions	\$118,077	\$57,540	\$60,537
Memorial Gifts	37,793	15,215	22,578
Memorial Garden	34,500	82,080	(47,580)
Employee Retention Credit/PPP	11,133	12,958	(1,825)
Caring Forever Patrons	13,900	15,050	(1,150)
Fundraisers & Events	25,900	-	25,900
Total Support	\$241,303	\$182,843	\$58,460
Investment Gain/ (Loss)	(1,156,474)	522,063	(1,678,537)
TOTAL REVENUES	(\$915,171)	\$704,906	(\$1,620,077)

EXPENSES	2022	2021	VARIANCE
Grants			
Memorial Drive UMC	\$12,000	\$12,000	-
Local Missions	57,638	31,150	26,488
Church Programming	21,862	49,070	(27,208)
Church Beautification	12,367	10,602	1,765
Student Scholarships	11,000	1,000	10,000
Pastoral Scholarships	9,384	22,952	(13,568)
Parishioner Support	500	4,870	(4,370)
Total Grants Made	\$124,751	\$131,644	(\$6,893)

Operating Expenses	2022	2021	VARIANCE
Salaries & Payroll Taxes	65,569	64,592	977
Memorial Garden	24,077	4,986	19,091
Banquet & Event	5,884	-	5,884
Administrative	7,040	5,592	1,448
TOTAL EXPENSES	\$227,321	\$206,814	\$20,507

CHANGES IN NET ASSETS	2022	2021	VARIANCE
Changes in net assets	(\$1,142,492)	\$498,092	(\$1,640,584)
Beginning of year	\$7,218,491	\$6,720,399	\$498,092
End of year	\$6,075,999	\$7,218,491	(\$1,142,492)

John & Sande Varesic*
David & Janis Vasut
Bonnie Vedlitz
Dot Vinyard
Irv & Jacque Wagner
Andy Watson*
Dee Westcott*
Elaine White*
Thresa Wieting

Eric & Heather Willard*
Beverly Williams
Eric & Kelly Williams*
Cindy Williamson
Tom & Lillie Beth Wilson
Russell Workman
C. A. & Janette Zackary*
John-David Zieba
Brad & Michelle Zschappel

Linda Zubler
Bob Zurik
The Foundation makes every effort to maintain an accurate donor base. If you notice an error in this listing of names, please let us know.



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stacystepler@mdumc.org

Lisa Nelson
Administrator
lisanelson@mdumc.org

WEBSITE

www.mdumc.org/cff

“

We can change the world and
make it a better place. It is in our
hands to *make a difference.*

— Nelson Mandela