

**Board of Trustees
March 3, 2026 Meeting
Foundation Report**

Last Fiscal Year 2025 Giving (07/01/2024 – 06/30/2025)

Total \$3,191,777
1,127 gifts

This Fiscal Year to Date Giving (07/01/2025 – to 02/26/2026)

Total \$2,500,912
1,146 Gifts

Total Net Invested Endowed Assets as of 02/25/2026: \$61,908,493.62

Restricted - \$28,207,450.72
Scholarship - \$30,949,092.01
Unrestricted - \$2,751,950.89

These endowment funds are valued as of March 31 annually and per Foundation Investment Policy Statement budgeted for their restricted purpose at up to 5% of the fair market value of the fund for the upcoming fiscal year (07/01 - 06/30).

Foundation:

- Migration to new data-management software in complete, Bloomerang;
- February 10 – New Director Orientation for Adam Kiker and Gary Evans;
- Planning for annual Guarantors Recognition Dinner;
- Spring Foundation Board Meeting planned for April 27.

Gardens: Hosting SCC Alumni Peter Hatch, March 19, for a special lecture on “Thomas Jefferson’s Revolutionary Garden at Monticello” Peter Hatch has been the Director of Garden and Grounds at Monticello for over 35 years. This event kicks off a series of “America 250” events in the gardens.