




Pathways

United Methodist Foundation of
Western North Carolina, Inc.
2011 Annual Report

The United Methodist Foundation of Western North Carolina, Inc. is a ministry of the Church, for the Church whose mission is to build the Church for generations to come. We fulfill this mission by investing in people, churches and related institutions, and innovation. We envision a church where people live out their faith through the faithful stewardship of their God-given resources.



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A scenic mountain landscape. In the foreground, a dirt trail winds through a grassy hillside with scattered rocks and small yellow flowers. A line of evergreen trees stands in the middle ground. In the background, majestic mountains with snow-capped peaks rise against a clear blue sky.

*“direct me in the path of your commands,
for there I find delight. turn my heart
toward your statutes and not
toward selfish gain.”*

-Psalm 119:35-36

Dear Friends of the Foundation,

The theme for this year’s annual report is “Pathways.” If you find this word in the dictionary you will find the primary definition to be: course; path. These words perfectly represent the United Methodist Foundation of Western North Carolina, Inc.

In the late 1960’s Western North Carolina Conference leaders set out on a course, a path, if you will, to ensure that ministries would be funded in perpetuity with the creation of the Foundation. Since that time, we have sought different ways to continue on the course that was laid out by our forefathers. Like a wandering path, that course has taken several directions, all while focusing on fulfilling our mission.

Today, our mission to “build the church for generations to come” encompasses our original mission. However, instead of offering three ministries, that path has now led us to offer endowment development, planned giving, fund management, stewardship education, leadership development, loans and grants. At the core of these ministries is the full support of the board and staff of the Foundation in an effort to make a positive difference in The Western North Carolina Conference. We know that the strength of the Foundation depends on the overall strength of the conference. Therefore, our path will always include finding ways to strengthen our conference and support the conference’s mission.

As you peruse this annual report, we hope that you will not only notice the many pathways our ministries have taken, but more than that, the stories you find along the way. Lives are being changed, faithful stewardship is being practiced and ultimately, people are brought to Jesus Christ. We are most grateful for the privilege to take this journey with you and look forward to the time when our paths cross again.

Yours in Christ,



Christopher W. Davis
Chairman of the Board



David A. Snipes
President & CEO

Pathways

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Western North Carolina, Inc.
2011 Annual Report**

People | Churches | Innovation



reynolds leadership programs

Rev. Karen Miller, Pastor

When Rev. Karen Miller served as Asheville’s district superintendent, she participated in the Reynolds Program in Cabinet Leadership. It’s sponsored by the United Methodist Foundation, one of their many opportunities for leadership education. Participants met for three sessions over ten months. The experience offered methods of leadership assessment coupled with support during the sessions and outside of them. These included evaluations like the Myers-Briggs Type Indicator, time with a personal coach, reading and writing exercises, and individual evaluations by supervisors, supervisees and peers. “The training built my confidence and skills as a leader, and gave me the motivation to do more coaching, training and risk-taking in my own district,” Miller says. When congregations closed their doors, Miller asked the conference to recycle the leftover funds to train current pastors, reducing the likelihood of closings. She began a leadership program for district clergy centered on small group training and discussion. Each of these connected her to what she calls “the heartbeat of the local church.” Now, as pastor of Wesley Memorial United Methodist Church in Statesville, she still takes inspiration from the Reynolds Program. “I see that regular reality checks, a kick in the pants, and a good bit of training and soul-tending can result in a better leader for Christ and the church.”

People

Covenant UMC, Charlotte NC Rev. David Lee, Pastor

Talk to folks at Covenant United Methodist Church and you’ll hear two words: Impact Community. It has become a motto of sorts for this Lake Norman District church. Here’s why: in a spinoff of the conference-wide day of service also called Impact Community, Covenant teamed with five other local churches to serve people in need right in their backyard. Other churches involved were Christ UMC, Homestead UMC, Moores Chapel UMC, Thrift UMC and Mulberry Presbyterian Church. “We’re not at churches where we can bankroll an entire project by ourselves,” Covenant Pastor David Lee says. “We recognize that we need one another to put on something like this.” They also reached out to the United Methodist Foundation. With the support of Scott Ireland, the Foundation’s executive director of Reynolds Ministries, the cluster of churches received a Reynolds grant to make Impact Community a reality. One Saturday last summer, 100 people turned out to work on projects like building wheelchair ramps and knitting hats for premature infants. The grant went towards purchasing the needed materials. The day ended with a community cookout for the volunteers and the families they served. Scott Ireland was the speaker. Lee describes the entire experience as a team effort, and calls the Foundation an advocate throughout the entire process. Now, Impact Community continues in new ways. With the leftover grant funds, the churches have partnered with Coulwood Middle School, a local Title I school. Their blue Impact Community t-shirts, sponsored by local businesses, make them stand out. “It’s a work in progress. It’s ongoing,” Lee says. “When you see middle school students recognizing people from your church, I think there can only be good momentum going forward.”

endowment development

In his 87 years, there's one thing William "Doc" Long knows for sure: he's been blessed. Born in Stokesdale, N.C. and raised in Summerfield, Long grew up during the Great Depression. Even then, his parents instilled in their children a giving spirit. He recalls his family's relationship with their neighbors: "If we needed help, they helped us, and if they needed help, we helped them. It was done without any thought of compensation." Long served in France during World War II. Before he left, his aunt gave him a pocket Bible and told him to carry it over his heart. When he was badly wounded, shrapnel gouged the Bible straight through. Long recalls: "Without even thinking, it just came out of my mouth: God have mercy. And He did." Back in Summerfield, he rehabbed his injuries and married. He and his brothers founded Long Brothers, a transportation business, run by his family today as Hilco Transport. Long still goes to the office daily. And he still uses his blessings to bless others. This year, he created an endowment for Summerfield United Methodist Church, where he has been an active member for more than 70 years. At least 20 of those, he has served on the Finance Committee. When he wrote up his will, the church was included. Long wanted to provide for major building projects. He soon realized that he wanted to see firsthand what his gift could create. So Long called on the United Methodist Foundation to help make his dream a reality. Being able to watch the church prosper is a gift back to him, his daughter Patty says. The capstone on a lifetime of generosity. And that Bible, violently pierced by shrapnel in 1943? Long still has it, a symbol of God's grace and an inspiration to serve.

Summerfield UMC, NC
William "Doc" Long, Member

"This what God says, the God who builds a road right through the ocean, who carves a path through pounding waves..."

-Isaiah 43:16

People

stewardship education

St. Matthew's UMC, Greensboro NC

Dr. Arnetta Beverly, Pastor

Dr. Lewis Burgman, Stewardship Chairperson

Dr. Arnetta Beverly, pastor of St. Matthew's United Methodist Church in Greensboro, lights up a room when she walks in. She is the congregation's first female pastor in 142 years. Four years into her appointment, "I'm loving it," she says with a grin. She arrived in 2008 after serving as a district superintendent and holding other positions at the conference level. At the time, St. Matthews, the conference's largest African-American church, had never run a genuine stewardship campaign. "It was, 'Okay, pass out the pledge cards, fill them out, give them back,'" Beverly recalls. There was no further exploration involved. She enlisted the help of the United Methodist Foundation. Foundation President and CEO David Snipes led a weekend program on stewardship education for church lay leaders. The program focused on thinking beyond the collection plate. Dr. Lewis Burgman, then the stewardship committee chair, says Snipes emphasized the belief that "we are stewards of the gifts of God. It belongs to God up front. We're just returning it to Him." Since then, Beverly has noticed a change in the congregation's approach to giving: "It planted a seed. It's a lot more than just the collection plate now. If I make an appeal, the funds are there." Snipes has since returned to St. Matthews to speak about the Herb Miller Consecration Sunday Stewardship Program, which outlines an effective step-by-step campaign. "What I think a lot of our churches may not realize is the quality of the staff of the Foundation and what they are able to bring to a local church, in terms of stewardship, finance and evangelism," Beverly says. "I don't think we call on them enough."

Churches

grant programs

Oakley UMC, Asheville NC

Rev. Shelly Webb, Pastor

Oakley United Methodist Church in Asheville, N.C. was considered a dying church. The historically-thriving congregation had dwindled to 50 people. Its worn-down neighborhood is known as the place to find drugs. People were leaving the neighborhood but many of the poorest remained. Around 80% of children who attend Oakley Elementary are considered impoverished. The structures of community just didn't exist anymore. But the Reverend Shelly Webb didn't see a dying urban church in a rough neighborhood - she saw the possibilities. How could Oakley UMC be a common place for this group of ethnically, racially and economically diverse people? By planting a community garden. A garden funded by a United Methodist Foundation grant. "We dreamed that the community garden would be our mission and that we would find common ground with our neighbors," explains Webb. The garden became the place in the neighborhood where people would meet. The soil surrounding this urban church not only produced food for the hungry (and a lot of it), but also a newfound sense of community among the church's neighbors and members. At Oakley UMC, diverse groups are interacting through growing their own food. Older members of the congregation were pleased to find they had something to share this influx of young newcomers. They taught a well-received workshop on canning tomatoes. "It's about building relationships and trust. We've found something that unites us," she says. "And we couldn't have done it without the grant." In the coming year, the community garden at Oakley UMC will continue to evolve. They plan to double the size of the garden and add a tailgate market that accepts food stamps. They have also discovered what kinds of food people especially like. "More potatoes," Webb laughs. "The first potato from our garden was in the shape of a heart. I took it as sign that we're doing something right with this garden - that this is a way to embody the love of God in our community."



Innovation

*“Lord, teach me your ways,
lead me along a straight path.”*

-Psalm 27:11

Cape Coral First UMC, Fla
Rev. Jay Therrell, Pastor

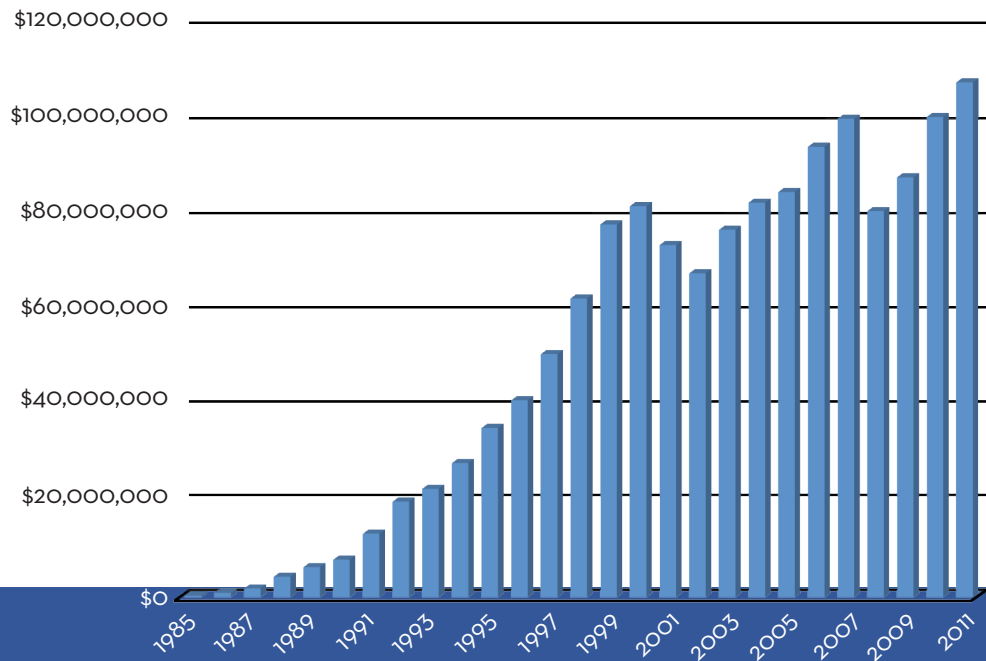
Cape Coral First United Methodist Church in Cape Coral, Fla. is teaching youth that you don't have to be ordained to be in ministry. S.A.I.L., or Students of Action, Initiative and Leadership, is a series of retreats for students who want to become leaders in The Intersection, the church's youth program. The goal is a deepened faith, increased knowledge of Christian leadership principles and awareness of their own spiritual gifts. The results? "Students can use those gifts in the youth ministry at Cape Coral, but also in other areas of their lives. By increasing their Christian leadership skills, S.A.I.L. also teaches them to be a catalyst in their schools, their homes, with their friends and in their families," says Pastor Jay Therrell. "There are definitely a couple that feel the call to youth ministry, but we also want to train a generation of Christian school teachers and garbage collectors, Christian doctors and insurance agents - ambassadors for Jesus regardless of their profession." Not only did a United Methodist Foundation Grant make S.A.I.L. retreats a reality and furnish a new high-tech youth room, but it also gave a much-needed morale boost to the entire church community. "We are not a church of wealthy folks and this money has had a major impact," says Therrell. This portion of southwest Florida is second only to Las Vegas in the number of home foreclosures. The county's unemployment remains at 10%. Without financial support from this grant, Cape Coral First United Methodist Church's youth ministries wouldn't be as effective in providing a place of spiritual growth for students in the community. "It's just as important to teach students that they can effectuate some major change, both in the church and in their daily lives," says Therrell. "Even on their sports teams. Lately, more fellow teammates have been showing up with our students to youth ministry events, which is a great thing."

development fund

Asheville District

Rev. John Boggs, Superintendent

The United Methodist Foundation Development Fund is more than just a bank. "It's a way for United Methodists to invest their money in a way that helps other United Methodists fulfill their mission," says the Reverend Doctor John Boggs, district superintendent for the Asheville District. For these investors, the UMF Development Fund offers an alternative with the security of relatively low-risk, fixed-income investments similar to certificates of deposit or money market funds. The Asheville District is a major contributor, as are many of the district's churches. "We've found the Development Fund to have the competitive rate that we need, but it also helps other churches across the Carolinas, and even within our own district," he continues. Boggs recounted the stories of two churches within the Asheville District that recently received assistance from the UMF Foundation Loan Program, which is supported by the Development Fund. Both churches purchased land contiguous to their present property and the Foundation worked out a loan to help make that expansion a reality. "The United Methodist Foundation is not just a place for investing or borrowing money - it's a live, organic part of the church, especially having a clergy person like David Snipes at the helm," says Boggs. "It's a real resource for United Methodist churches, districts and the conference." But for Boggs, involvement with the United Methodist Foundation doesn't end with the Development Fund. Three Asheville District churches recently received grants and Boggs also completed the Reynolds Program for Church Leadership in 2006. "The experience came at a time when I was in need of some new fire and excitement," Boggs says. "It was a fresh restatement of my call and what I'm trying to do within the church." One of the most powerful parts of the program was his peer group. This small group met for discussions and looked at contemporary issues in the ministry. All of the members were of similar ministry stage and size of church. "Everyone has a live context and they bring that practical aspect to your learning," he continues. "The program is for leaders who have the potential to excel if given the opportunity to think, reflect, read and learn. I highly encourage others to participate."



investment objectives:

- Balancing risk with competitive rates of return
- Competitively low administrative costs
- Compatibility with the *United Methodist Book of Discipline*
- Choice of four different investment fund objectives

investment services:

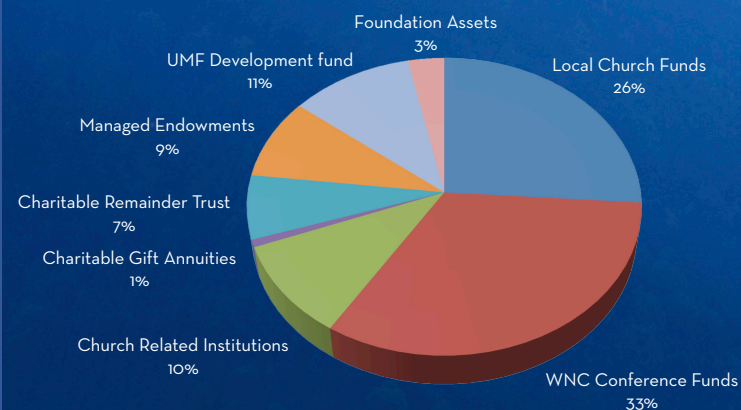
- Sub-accounting available for multiple accounts
- Professional consulting services of Callan Associates
- No minimum balance on long-term investments
- Fast service and response for distribution requests
- Monthly statements and quarterly performance reports
- No Restrictions on withdrawals for long-term investments

Advice Statement:

The United Methodist Foundation of Western North Carolina, Inc. does not engage in rendering legal or tax advisory services. Charitable and planned gifts involve complex federal and state laws. Professional advice from legal counsel or other personal tax or financial advisors should be sought. Be sure to consult your own professional advisors as it pertains to your own individual situation.

Managed Assets at a Glance

Local Church Funds	\$28,520,565
WNC Conference Funds	\$35,879,937
Church Related Institutions	\$11,138,623
Charitable Gift Annuities	\$879,997
Charitable Remainder Trusts	\$7,569,002
Managed Endowments	\$9,604,561
UMF Development Fund	\$12,079,100
Foundation Assets	\$3,570,470
TOTAL ASSETS:	\$109,242,255



United Methodist Foundation of Western North Carolina, Inc.

2011-2012 Leadership Team

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Earl Wilson, Jr.
Jamie Armstrong
Faye L. Herbin
Tim A. Reimer
Boyd M. Holliday
Bill Johnson
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Patricia Wiseman
Caroline Wood
Ex Officio/Staff Liaison
Christian Burns

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David Snipes

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David Snipes
Scott Ireland
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Goldston Harris
Roy Helm
Ex Officio
Christopher W. Davis
Ex Officio/Staff Liaison
David A. Snipes

Development Fund/Loan Team

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Brad Chapman
Dave Guilford
Roy Helm
Mark King
William D. Mileham, III
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Diana Kauserud, Secretary
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Advisory
Jane Reynolds
Royce Reynolds

Royce & Jane Reynolds Leadership Team

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Diana Kauserud, Secretary
Russ Moxley, Consultant
Dave Guilford
Jody Seymour
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David Snipes
Janice Virtue
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Royce Reynolds

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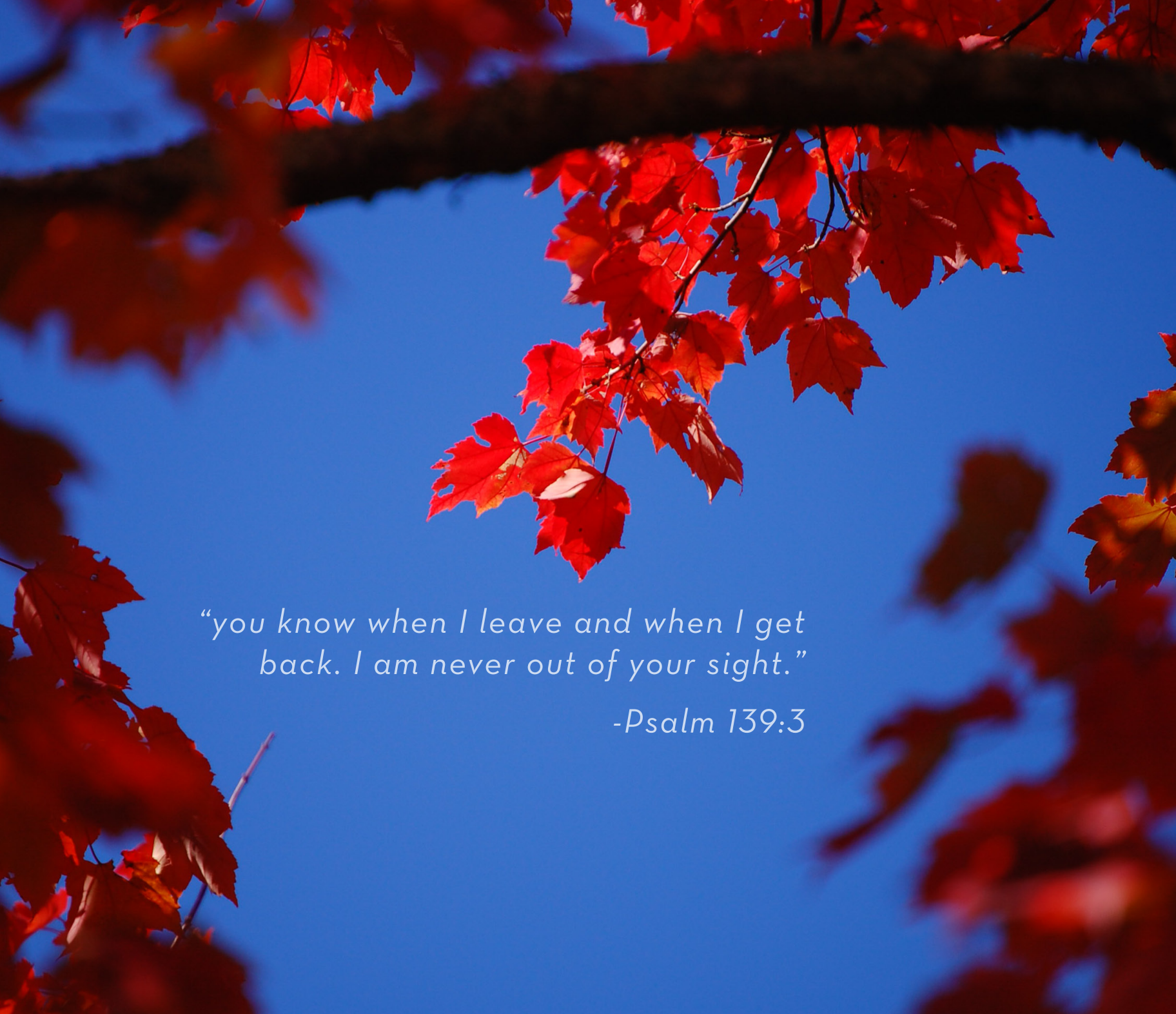
Ocean View United Methodist Church on Oak Island, N.C. was facing financial challenges. After building a new sanctuary in 2007 and taking out a second mortgage, the church was racking up monthly payments of about \$18,000. With a weekly attendance of 350 people, it was a stretch, to say the least. “That was a substantial portion of our budget. We were never behind, but it was tight,” says Jeff Siebold, who stepped into the role of finance chair in 2010. Even after paying off the second mortgage and reducing monthly payments to around \$13,500, Ocean View had to make serious staff reductions to come up with a realistic budget. “We weren’t able to put money into ministries and missions because it was going to pay for the building. It was a priority for the whole church – to pay off the mortgage so we can focus on helping people,” says Siebold. “It seemed like there should be someone out there to help churches in this situation.” Luckily, there was. The Western North Carolina United Methodist Foundation Loan Program was created to assist United Methodist congregations just like Ocean View. The program is available to congregations, institutions or other organizations within the United Methodist Church in North and South Carolina. Since the Eastern N.C. United Methodist Foundation does not provide this service, Ocean View’s situation is a perfect illustration of the importance of denominational collaboration across the Carolinas. Thanks to the UMF Loan Program, Ocean View was able to refinance its loan and free up roughly \$4,000 a month to use toward the ministries of the church. From overseas missions to feeding the hungry in their own community, the church is able to focus on outreach. The congregation at Ocean View is interested in more than just showing up on Sunday mornings – they’re interested in making a difference. When the church sent three groups to Biloxi to rebuild houses after Hurricane Katrina, Siebold was among them. At one of the church’s local missions, Soup on Saturday, volunteers provide a warm, filling meal. “People are either lonely and come for the social or the spiritual aspects, or because they’re hungry,” Siebold explains. “The loan program is really about helping churches succeed,” he says. “David Snipes was as interested in the health of our church as he was in our mortgage issues. He wanted to know about the types of programs the church was involved in and what they wanted to do. The entire process was very spiritual. We were pleased. It has had a huge impact on our community.”

loan program

Ocean View UMC, Oak Island, NC
Jeff Siebold, Finance Chairperson

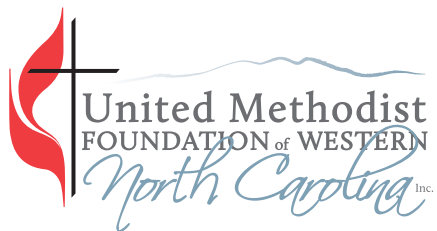


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*“you know when I leave and when I get
back. I am never out of your sight.”*

-Psalm 139:3



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A wide-angle photograph of a sunset over a body of water, with silhouettes of trees in the foreground. The sky is filled with warm orange and yellow hues, and the sun is a bright circle on the horizon.

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