

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 discipleship through the faithful stewardship of their God-given resources.





Dear Kindred,

Kindred. A word that brings thoughts of familiarity; sameness, comfort and ease within a relationship, or a group of people that have similar interests. In the world of United Methodism, we call this "connection." As preparations began for this annual report, it became obvious that it was important for us to share how we are connected to our "kindred" in the Western North Carolina Conference and how we are committed to fulfilling our mission to build the church for generations to come.

Who do we consider to be our kindred? You, the local church pastor looking for help in teaching your flock how our deep faith prompts us to respond generously with the financial resources God has provided. You, the church institution that seeks to invest monies in socially responsible ways while receiving a competitive return net of fees. You, the individual that seeks to find a way to practice stewardship beyond one's lifetime through the creation of an endowment that will fund your favorite ministry in perpetuity. And you, the United Methodist college student looking for ways to financially underwrite your college education so that you can hit the ground running upon graduation without the overwhelming burden of excessive debt. The reality is that all our brothers and sisters in Christ throughout the conference are our kindred, no matter how they might relate to the Foundation's ministries.

The year 2012 marked our 27th year of active ministry to and for our kindred. During this time, we have created ministries that not only help people and institutions be good stewards of financial resources, but have also created ministries that help promote, and in many cases, actually develop, good stewardship of gifts and graces for ministry. These ministries include endowment development, planned giving, asset management, grants and scholarships, leadership education, stewardship development and a loan program. Because of the faith our kindred have placed in us, the United Methodist Foundation of Western North Carolina has grown to become one of the largest foundations throughout the connection with total assets in excess of \$123 million.

The following pages include stories of people and institutions that have allowed us to be in ministry with them. As you read, we encourage you to consider the fact that the stories are not just about "someone," "out there." Rather, they are about your kindred...people and or institutions that have similar interests and the common goal of following Jesus, making disciples and transforming the world.

On behalf of the board of directors and staff, we thank you. Our kindred. Our family.

Christopher W. Davis

Christopher W. Davis Chairman of the Board

David A. Snipes
President & CEO



For Dr. David Greene and the Rev. Lara "Willis" Greene, the Reynolds Certificate Program in Church Leadership has provided a clearer vision of their mission in ministry – and a clearer vision of each other.

The husband/wife clergy couple, who met at Emory University's Candler School of Theology and married in 1993, has served together since 2002. David completed the Reynolds program in 2007, and Willis went through it in 2010. Each speaks enthusiastically about its impact on them as individuals. "My calling was affirmed and reinforced in one of the strongest ways that it has been," Willis says. She describes herself as a sponge, soaking up each moment as she learned more about her personal gifts and how they could impact her ministry. "Ultimately, there is only one leader: the mission of the church. That was my big takeaway."

David marks the effect of his Reynolds experience by something that happened several years after he completed the program. During a challenging time in their ministry, he took two days to leave town and contemplate the next step. He took his Reynolds material with him. "One of the things we talk about in the program is to 'get in the balcony,' gain perspective," he explains. "I reviewed the program, the resources, to remind myself: These are the things that a leader does."

"It was like he was focused again," Willis recalls of her husband's return. "When the United Methodist Foundation makes an investment in a pastor, I think that's what they want to see: that it influenced and interpreted his ministry."

Each has had significant individual experiences with the program, and they have combined to create a clergy team that seems to function with one brain. It is fascinating to hear them speak (separately) of each other's gifts. She says: "He is much more of a leader and visionary, where I am a manager." He says: "She is more about process and details, and I'm more about the bigger picture and vision."

This sense of clarity, of course fostered by nearly 20 years of marriage, has strengthened their ministry. "We didn't have to catch each other up," David says, and Willis agrees. "It gave us a common vocabulary. We could speak the same leadership language."

"We have found that it is meaningful and rewarding for us to be together," David says. "You have to understand how you're wired up in order not to kill each other, or fix each other. In this environment, really knowing what our strengths and gifts are has been very helpful in our ability to be a team. We can lean on one another."

For better, for worse, in sickness and in health, and in ministry after ministry, the tie that binds grows ever stronger.

South Tryon Community Church hosts a soup kitchen every Thursday. Situated next door to a public housing project, South Tryon is located in a community with a lot of need. The church works to address both the physical and spiritual needs of its neighborhood, one that approximately 80% of its congregation calls home. The Rev. Tiffany Thomas, 26, a graduate of Duke Divinity School, pastors South Tryon.

As young United Methodist clergy like Tiffany move from the seminary classroom to pastoral appointments, the Transition into Ministry program aims to provide necessary resources for their growth and success. Launched nationwide by the Lilly Endowment, this program is a means to combat the isolation and lack of support that many new clergy experience in their first appointments. The TiM congregation-based pastoral residency program offers new clergy the guidance of a mentor and assistance in developing the skills necessary to provide spiritual leadership to a congregation. After a full year of planning, preparation and partnering with the United Methodist Foundation, the program appointed seven young clergy in July 2012. Tiffany was one of them.

"We leave divinity school able to articulate the faith very well. But that's just one aspect of ministry. There were no classes at Duke on the administration of a church or how to motivate volunteers. But with this program, you have the benefit of an experienced pastor walking with you. I couldn't imagine doing it without Transition into Ministry," she says.

The Rev. Brad Thie, one of the TiM mentors and pastor at Friendship United Methodist Church in Newton, N.C., says, "Studies show that the beginning of ministry is critical in identifying and establishing healthy patterns for lifelong ministry. At a time when new pastors are the most in need of support, they are offered additional resources to help them to thrive in ministry and mission."

Tiffany meets with her mentor, Dr. James Howell, three of her TiM colleagues, and their mentors bimonthly to share experiences, joys and challenges.

"We share the real struggles that we have and the mentors offer wisdom and advice from their experiences. Sometimes they are struggles that our mentors have as well. Sometimes the struggles are not because you're new, but because it's real," she says. "Ministry can be isolating. So these authentic relationships are such a blessing."

Walking with new clergy is vital, both to their ministry and to those they lead. Because of the TiM program, their ministries are strengthened, their spirits encouraged, their leadership developed. "The TIM program has the future of the Church and its pastors in mind and strives to create opportunities for increasing excellence in ministry by both the pastor and the congregation he/she serves," says the Rev. Ashley Crowder Stanley, program director.

"The Transition into Ministry program is sincerely indebted to the United Methodist Foundation for seeing the potential from the beginning. The UMF has offered space, encouragement and insight along the way. The UMF staff has shown unfailing hospitality and guidance, as well as administrative support. We are thankful for and proud of our connection to the UMF and look forward to continuing a fruitful partnership going forward."

In her brief time at South Tryon, Tiffany has gradually introduced a time of sharing, homily and prayer to the Thursday soup kitchen. One neighbor told her, "I come more for the Word than I do the food." She started a children's ministry that grew from two children to 50 in a little over a month.

Tiffany recalls the story of a woman who came to the soup kitchen. She shared her story there, and over time, began coming on Sundays as well. She and Tiffany prayed together. She made the decision to go to rehab, and told Tiffany, "I want you to go with me."

Because that's what ministry is about - walking with someone. Sometimes even to rehab.



These days, district superintendents from the North Carolina and Western North Carolina Conferences are putting their heads together. The two conference cabinets met in November 2012 as part of the Reynolds Cabinet Leadership Program, facilitated by consultant Gil Rendle. It was the first of several joint meetings that will take place over the next two years to guide both cabinets as they navigate restructuring and changes to the D.S. position. A grant from the United Methodist Foundation of Western North Carolina will help to sustain the endeavor.

Restructuring has reduced the number of districts in both conferences. The NCC dropped from 12 to 8, the WNCC from 15 to 8. The 2012 United Methodist General Conference also charged superintendents with the new role of itinerant missional strategist. The Rev. Amy Coles, superintendent of the Smoky Mountain District in Western North Carolina, is part of the Cabinet Leadership Program. She says, "In our conference, we're defining it as out and amidst the churches… Helping churches to be more vital so that we can fulfill the mission of the church."

Since each district will serve a larger number of churches, sharing ideas across conferences made sense. "It was a good time to back up and say, 'What are we trying to get churches to do as we think about helping them to be healthier and more vital?" Amy explains. "Gil was wonderful in helping us to realize that the mission field is our client."

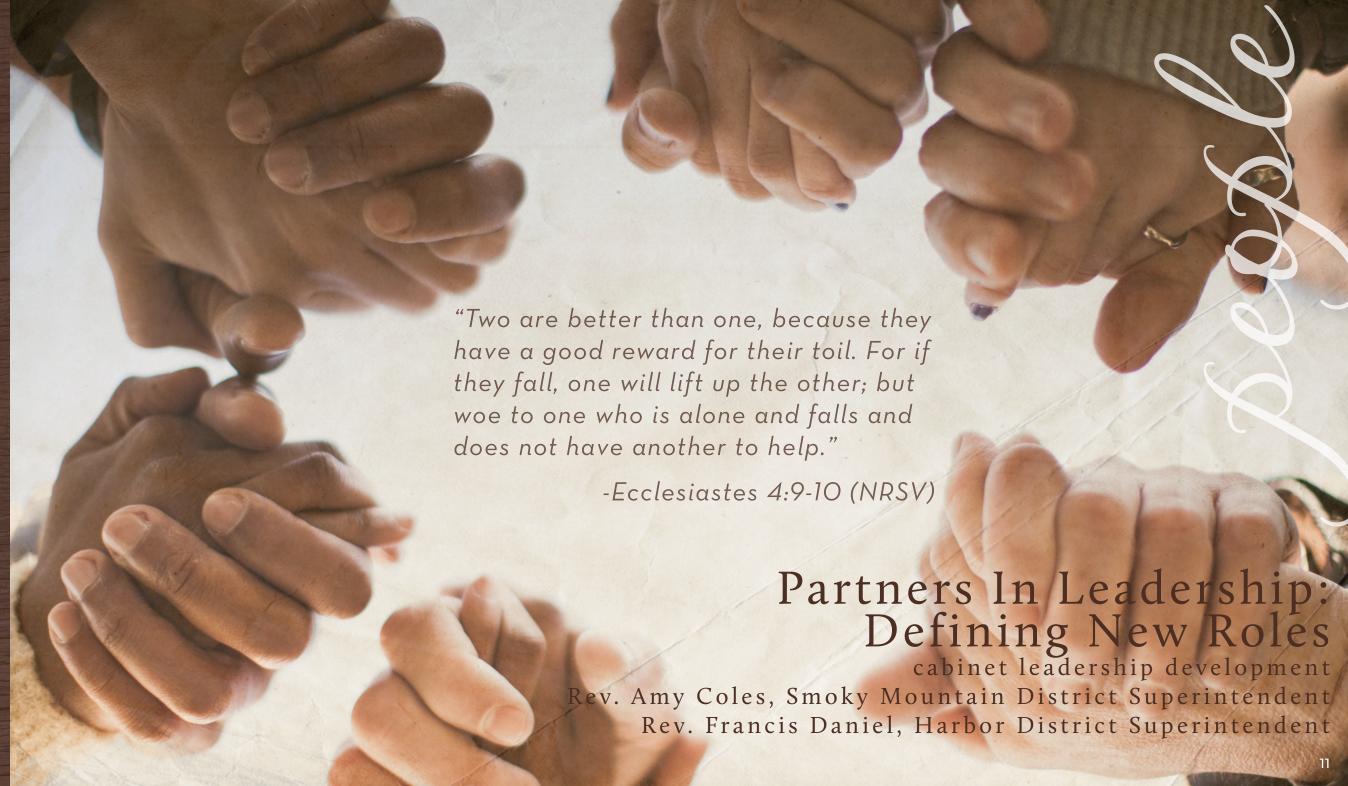
The two conferences are taking different steps toward this future. The North Carolina Conference uses the Three Dimensional Ministry model. The Rev. Francis Daniel, superintendent of the NCC's Harbor District, explains: "It's built on the concept of giving people tools that they can use to grow in discipleship, and to develop skills in disciple-making." Groups of 8 to 10 clergy and lay leaders in each district meet regularly, in person or via new technology such as Google Hangouts. Groups discuss two questions: What is God saying to me and what am I going to do about it? "That's the skeleton upon which we hang everything else," Francis says.

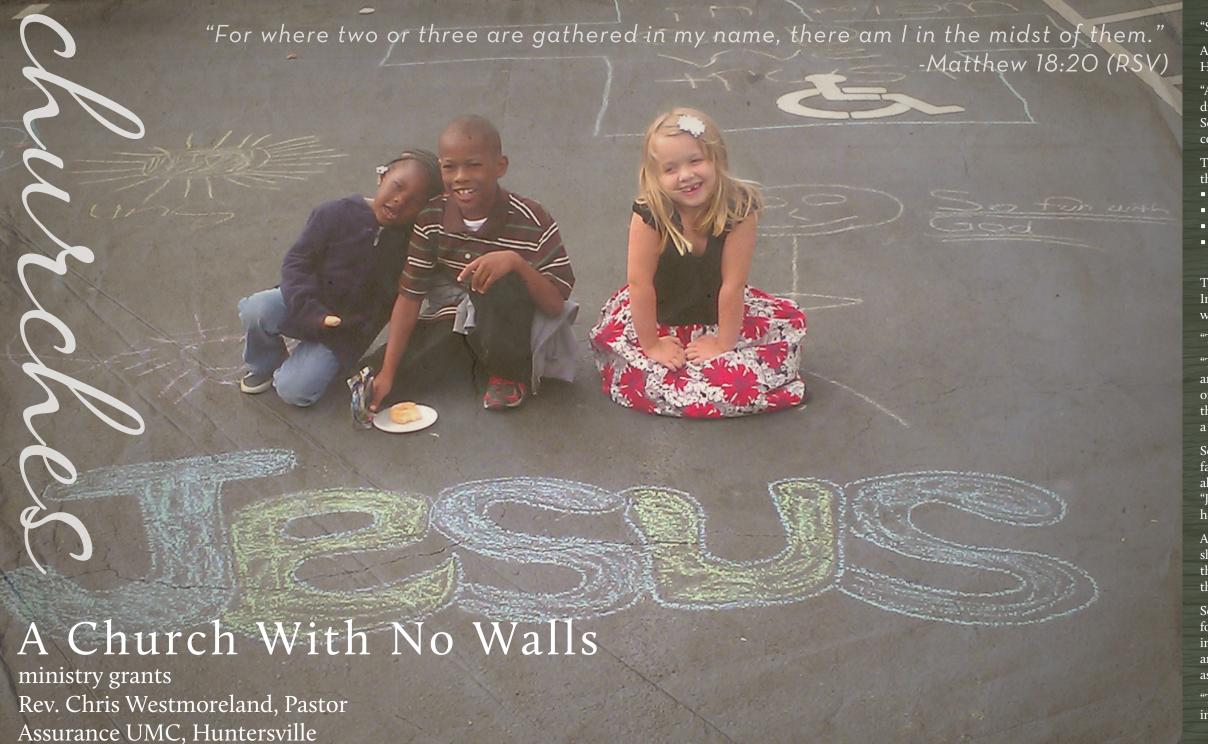
The WNCC has created what they call missional networks. Amy describes it as "a grassroots effort, where churches in the same geographical location can look at their community and think about ways that they can work together to meet a need that's not being met, or to partner with other agencies."

Because of these differences in process, Francis says, the Cabinet Leadership gatherings are particularly beneficial. "Listening to them share what they're doing, the challenges that are related to it... They're going through the same thing we are."

And unexpected results have already blossomed. At the first meeting, superintendents from both conferences paired up as prayer partners, and have continued in the months since. It's meaningful, Francis says: "It's a unique experience to know you have another superintendent praying for you."

"The next generation wants to see a church that's active and engaged. I think this is helping us to focus on how we might do that better as a church," Amy says.





"Strangers become neighbors and people live in a loving and cooperative faith community."

According to the Rev. Chris Westmoreland, senior pastor of Assurance United Methodist Church in Huntersville, that's the vision for the church's new campus in West Charlotte.

"Assurance UMC has experienced consistent renewal through a core vision focused on growing and nurturing disciples, while propelling and energizing missional outreach ministries. Growing and going, through Spirit, Serving and Sharing. As a congregation, we're committed to living out that mission even beyond the Northlake community," Chris explains.

The church is taking a four-pronged approach in its missional efforts in the community centered around the Assurance West Campus:

- Children/Youth through sidewalk VBS, youth sports activities and school support
- Counseling through social workers, prayer walks and training events
- Food/Clothing through outreach dinners, breakfast ministries and clothing donations
- Shelter through a temporary housing program, the Hope House, in partnership with Charlotte Family Housing and participating in Urban Ministries' Room in the Inn program

These efforts are thanks in part to a grant from the United Methodist Foundation of Western North Carolina, Inc. Last year, Assurance hired the Rev. Danny Meyer to pastor the new campus and the Assurance team worked together to discern the needs of the community, which resulted in the four areas of focus listed above.

"This is about people and not programs, so their stories are important," Chris continues.

"Through a pool party, a cookout, and snow cones, we positioned ourselves to learn more about the community and how our gifts might be best utilized. At each and every corner, we made ourselves available to hear stories of how generational poverty has affected the community," Danny says. "What we heard was that children were their greatest concern. What we heard was that if you want to be a part of the community, if you want to make a difference, then you need to meet our children in their need."

So the West Campus started a Sidewalk VBS, hosted snow cone socials, and blessed backpacks as summer faded into fall. Danny went door-to-door in the community, meeting neighbors and inviting them to church, along with their children and grandchildren. On one such walk through the community, Danny met John. "John approached in typical fashion, looking for spare change for a sandwich. But what unfolded was truly a holy encounter," Danny recalls.

After small talk shifted to talk of faith, God, and church, "John, authentically emotional, placed his hand on my shoulder and said, 'Don't take offense, but we've got a church at every corner. The problem with the church is that they are everywhere and nowhere at the same time. The problem with the church is that while we can see the buildings, we in the community don't feel their presence."

So the West Campus launched an outdoor worship service, redeeming an empty lot in the community known for "unhealthy" gatherings. "Outdoor worship was our response to a community that has lost its confidence in the power of the gospel," Danny says. "It's a response to a community that thinks church is defined by brick and mortar. It's a bold statement that the church is a community of believers, vehemently in love with Jesus, as they gather and scatter in His name."

"This poverty-stricken community continues to help Assurance Northlake see Jesus in new ways as they lean into His prompting to be a church that has no walls."

Real. Communion. Inclusive. Justice. Questions. Church deconstructed. Jesus. Poetry.

Those are a just few of the words you will find scribbled onto a restaurant napkin. It's the product of a group brainstorming session and the humble beginnings of the Connecting Road, an alternative faith community organized by the Rev. Jonathan Coppedge-Henley with the help of a Reynolds Ministries Grant through the United Methodist Foundation of Western North Carolina. Inc.

Research shows that more and more Americans, especially young adults, are choosing "none" when it comes to organized religion. But studies also show that many of these so-called "nones" are still seeking spirituality. Those seekers are the Connecting Road's target audience, seekers who may have a marginal, strained, disappointed or even nonexistent relationship with the church.

"A friend once suggested to me that 1 ought to try to start a church that was built around tolerance," Jonathan says. "I want to create community, an unwashed congregation of folks who just want to be themselves without having to pretend or put on a show for anybody."

Worship at a local brewery, an interactive website, and a new radio show launching in 2013 are the methods connecting these unlikely followers with kindred spirits: those with a heart for community service, a love of good music and a deep yearning for something real. By striking up conversations at rock concerts and unpacking theological elements of hit secular songs like Mumford and Sons' "The Cave" on a Charlotte radio station, Jonathan works to connect with the seekers where they are, rather than waiting for them to come to a church.

"It's so easy to stay isolated. But somehow, we know that's not what we are made for. Then you hear that one song that seems to speak directly to what you're going through, or you end up in a conversation with somebody in a pub or a coffee shop that feels like some kind of sign," he explains. "It's about being on this road together and finding the things, like music, that connect us not only to each other but also to something greater, something transcendent."

"Connecting Road is the shared journey."



The Rev. Sherron Geiger pastors Maiden's Chapel United Methodist Church in Franklin, N.C. Though a "retired" pastor, she says, "You can keep working as long as you're able!" Sherron participates in the United Methodist Foundation of Western North Carolina, Inc.'s Charitable Gift Annuity Program, one of many options for planned giving through the Foundation.

"I'm doing some estate planning, and the Charitable Gift Annuity seemed like a very good opportunity to do two things: to make a gift, since I could specify who the recipient would be and also to give me some monthly income now," she explains. "I have been 1,000% pleased." So pleased in fact, that Sherron also decided to invest in the Development Fund "because of the excellent relationship that I have with the Foundation."

Originally ordained in the Episcopal Church in 1981, Sherron has been in the United Methodist Church for seven years. "Somehow God pounded on my head and said, 'You're doing the right thing but in the wrong place." Her decision to leave one denomination and join another came three years after she was widowed. "It has been absolutely the right thing to do."

Five years ago, when Sherron first came to Maiden's Chapel, it was a small congregation, just on the edge of closing. The current membership is approximately 52, including the 21 who have joined since she arrived. "It has come back very well now and has become a family. There are some members with four generations coming to the same church."

"Interacting with these families restores your faith in organized religion. The congregation is very mission-oriented, particularly in their own county. They have deep roots and were raised to take care of each other. They still maintain that outlook of 'we're okay but we need to help those who aren't.' It's a delightful place to be," she says. Her involvement in the Development Fund draws on the same outlook that resonates in her rural congregation.

For Sherron, the UMF Development Fund is an opportunity to invest in other United Methodist congregations who may be struggling. "Many smaller churches have difficultly getting commercial loans. And even if they can, the interest rate would be more than they can comfortably afford, especially for churches with older facilities needing major overhauls."

"When you can do a little bit of good and still have some income, it really is a win-win situation."

Since 2007, students from Duke University Wesley Fellowship have flocked to an old yellow house with a sweeping front porch just across from Duke's East Campus. They call it the Wesley House. And they come for one reason: to soak in grace.

Dr. Jennifer Copeland, Duke's United Methodist chaplain, has been part of the process from the beginning. "You walk in, and the living room is huge, eleven-foot ceilings, glass doors into the dining room... It's a gorgeous home." She pauses. "And it had been a rental property for fifty years. When we bought it, it was a wreck."

The house was built in 1910. Nearly a century later, Duke Wesley Fellowship purchased it with the goal of creating space for fellowship and Christian community in the midst of bustling college life. And they couldn't have done it without the United Methodist Foundation of Western North Carolina.

"The Foundation came here, saw the house and we talked about the logistics," Jennifer recalls. The UMF provided a \$287,000 loan through its Loan Program. It acts essentially as a home mortgage. "We decided to proceed the way anyone proceeds when they're getting a mortgage," Jennifer says. "Get it appraised, get it inspected, draw up the paperwork, and off we go."

On the house's top floor, eight Wesley students rent rooms at a cheaper cost than campus living. Jennifer selects the new crop of residents each year, based on seniority and leadership involvement. Each group seeks out ways to live in intentional community. This year, residents gather on Monday mornings for breakfast and morning prayer before class.

Senior Kaitlyn Batt has lived in the Wesley house for two years. She's been in Wesley Fellowship since her first year, and has served as its spiritual formation chair, social justice chair and student pastor. "I can't think of a better way to live – during college, especially – than in Christian community," she says. "The support, love and grace that I've received from my housemates, and the feeling of having a family to go home to, have been wonderful."

Downstairs is home to countless communal activities. A small group for freshmen meets weekly, and the house serves as a haven for underclassmen when life on campus gets chaotic. "They come to relax, watch Duke basketball, bake in the kitchen, study... The house is not simply meant to be lived in, but used for worship and fellowship." And, Kaitlyn adds, that doesn't simply mean Duke students. "The Wesley House is different first and foremost because it is based on Christian principles of hospitality. Anyone in the community is more than welcome to come by." Last spring, the house and its residents played host to a neighborhood open house, selected to do so from among several campus houses. "We grow together and become better at loving one another and expressing hospitality to all members of the Duke and Durham community."

Says Jennifer: "It's the best decision we've made."

Under a Roof of Grace

loan program

Dr. Jennifer Copeland & Kaitlyn Batt Duke University, Durham















We're Not Alone

Mark Bailey, Director of Development

development fund

Givens Estates, Asheville

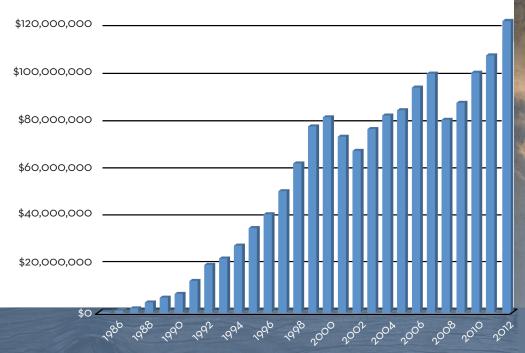
Mark Bailey recalls the first time he drove onto the campus of Givens Estates in 1988. "I thought, 'Is this for real?' It just felt warm and welcoming." Mark serves as director of development for Givens, a nonprofit retirement community located in Asheville and affiliated with the Western North Carolina Conference. He is also on the board of the United Methodist Foundation of Western North Carolina, Inc. and has a special place in his heart for the mission of the Foundation, having watched it grow steadily for nearly 30 years. Givens is one of the Foundation's largest clients, with multiple investment accounts.

"One of the things I treasure in working with the staff of the UMF is the feeling that we're not alone," Mark says. "In the charitable estate planning world, there are a lot of questions, and not everything is straightforward. The Foundation has always been there to help us answer those questions, and to help our donors with their questions. They jump through hoops to help us get information to donors who are trying to make decisions quickly. They go the extra mile."

Givens Estates has been serving seniors in Western North Carolina since 1979, and is committed to serving people of all economic backgrounds with compassionate care. The South Asheville campus is made up of 215 acres. A second campus, the Great Laurels of Junaluska, opened in 2007 and is situated on a knoll across the road from the main entrance of Lake Junaluska in Haywood County. Combined, the two campuses house approximately 840 residents, and one out of four receives assistance to help with the financial challenges often found with aging. Givens also recently acquired Highland Farms in Black Mountain, which houses 340 occupants. They plan to look at opportunities to develop a Resident Assistance Fund for this community as well. "Since the mid-1990s, the Foundation has invested and handled the sub-accounting for our 30 named endowments. They also provide competitive returns and do so in accord with the United Methodist Socially Responsible Investment Guidelines," Mark says.

He believes that Givens' partnership with the Foundation is instrumental to its success. "We're earning the respect of the people we work with. Good information on planned giving opportunities, accurate records, and realistic returns on their investments all give our donors confidence and help them understand that we're truly striving to meet their wishes for our ministry." Not only that, but Mark credits the Foundation's team for constantly being willing to help think through some of the more complex giving scenarios. "I've been involved in planned giving for over three decades, yet sometimes you still need to review various strategies with others who understand charitable estate planning to make sure we are giving our donors the most current information. The Foundation has hosted events for the development staff of the three retirement communities in our Conference, so that we can share with each other and learn more about how the Foundation can work with us in achieving our "goals."

"We're truly blessed, and the United Methodist Foundation is one of those blessed connections. It's a warm and welcoming connectional ministry."



investment objectives:

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

investment services:

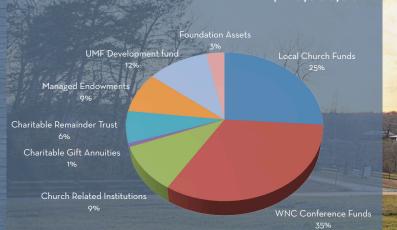
- Sub-accounting available for multiple accounts
- Professional consulting services of Callan Associates
- No minimum balance on long-term investments
- Fast service and response for distribution requests
- Monthly statements and quarterly performance reports
- No Restrictions on withdrawals for long-term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

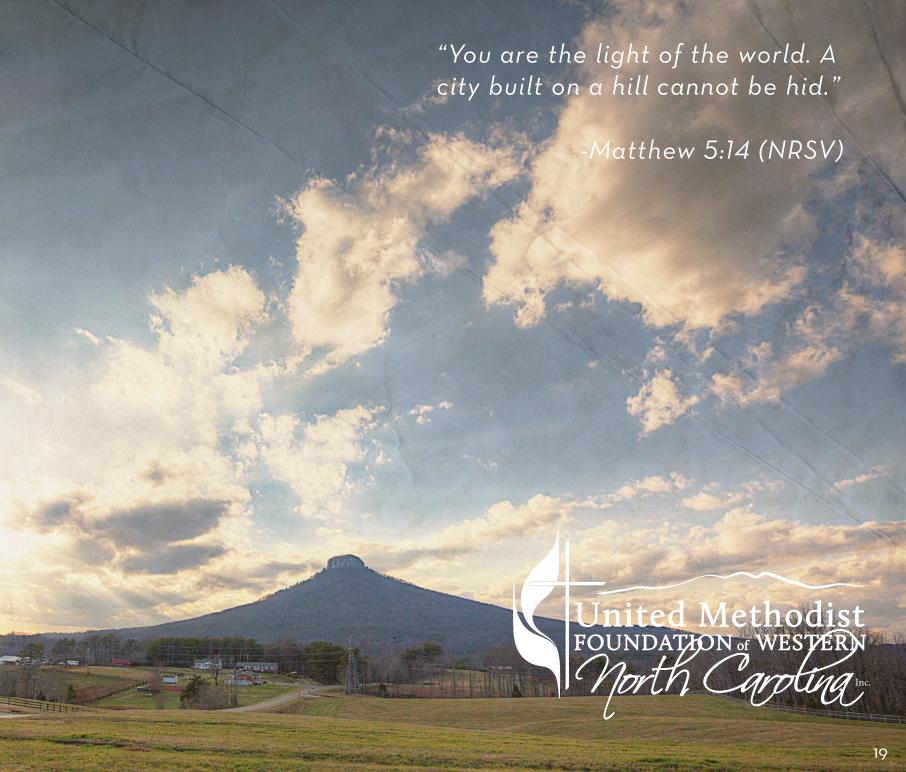
Advice Statement:

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 \$31.505.743 WNC Conference Funds \$43.538.396 Church Related Institutions \$11,358,419 Charitable Gift Annuities \$832,346 \$7,444,351 Charitable Remainder Trusts Managed Endowments \$10,732,923 \$14.606.748 **UMF** Development Fund Foundation Assets \$3,547,881 TOTAL ASSETS: \$123,566,807





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There's more to good stewardship than writing a check. That's the lesson of the Pyramid of Christian Generosity. A stewardship model created by Dr. Mark King and the Rev. Andy Langford, it is designed to nurture overall spiritual growth and commitment and link it back to habits of generous giving.

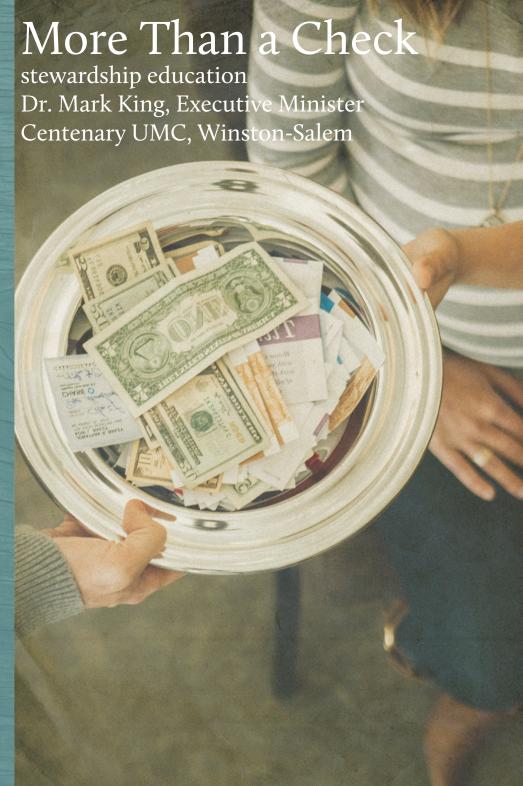
Mark, of Centenary United Methodist Church in Winston-Salem, and Andy, of Concord's Central United Methodist Church, crafted the Pyramid model in 2010. They wanted to provide an alternative approach to the programs that Mark calls too "dollar-driven" to support stewardship as a holistic practice. He credits Langford with this concept. "The pyramid is not so much about dollars as it is the level of commitment, where people are in their own personal stewardship. That really was Andy's genesis."

The Pyramid of Christian Generosity is centered on a 4-week devotional book. Participants learn about the six steps of giving: Occasional Giving, Intentional Giving, Second Mile Giving (which includes Capital Giving), Tithe Giving, Extravagant Giving and Legacy Giving. With each step up, the level of commitment increases with steeper challenges, forming a pyramid. The daily devotions contain stewardship-related illustrations from Scripture and personal stories shared by Mark and Andy. A question or thought of the day ends each reading.

While the personal portion of the curriculum is central to its vision, the Pyramid model also encourages congregations to bring their distinctive elements and unique stories to the process. This adds an angle of community that is equally significant for churches working to further radical generosity, and serves as a reminder that all individuals make up the Body.

Mark and Andy did a trial run of the model with their congregations in 2010, which produced effective results. In 2011, they began to widen its reach. Mark praises the United Methodist Foundation stewardship team for their critical role in the promotion of the model, which included a grant to assist in presenting it to conference churches. A gathering of 60 clergy leaders came together for a tutorial. Since then, almost 30 churches in the conference have used the Pyramid of Christian Generosity. The UMF will endorse the model in 2014, as part of the Conference's upcoming focus on Faith and Generosity.

"Stewardship is not about giving to the institution or about raising funds for the budget," Mark says. "It's really about your own commitment and relationship with God. And as you take one step further in your stewardship, you will hopefully get to the point where you are a legacy giver."







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