

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 Friends of the Foundation,

We are pleased to provide to you our 2013 Annual Report: Expectations. Contained within these pages are stories about lives – individual and corporate, alike – that have been changed through the ministries of your United Methodist Foundation. Our hope is that you will see how we live into our mission to build the church for generations to come by not only living up to the expectations God has laid before us, but also those expectations of our constituents. For this privilege, we are grateful.

The theme of "expectation" is found throughout the story of our faith. We know that the mission of the church is to make disciples of Jesus Christ. A simple command, or expectation, yet filled with challenges. So how are we to overcome the doubt that may hinder us from meeting the expectations of those around us and especially that of God? Jeremiah 29:11 gives us insight.

"For surely I know the plans I have for you, says the Lord, plans for your welfare and not for harm, to give you a future with hope." As the board and staff of the United Methodist Foundation contemplate these words, we realize that our calling that was acknowledged so long ago lives on today and is something that is beyond any one of us, but rather a mission of us...who we are...the ministries we have created...the ways in which we go about our work.

We continue to invest in people through our planned giving, leadership development, individual stewardship, and scholarship grant programs. Our mission is furthered through our investment in churches and related institutions when we provide endowment development, socially responsible fund management, competitive loans, corporate stewardship development, and ministry grants. We take pride in knowing that many of our programs are innovative and are pleased when our ministry grants help to promote innovative ministry out in the world.

Only God knows what the future holds for any of us. However, we do know that as we move forward in time we can do so with "expectant hope" that what we are doing God would have us to do. It is through our faith that we fulfill our mission and anxiously await the next set of expectations that you and God have in store for us. As we anticipate this journey, we hope you will join us by allowing us to be in ministry with you!

In Christ,

Christopher W. Davis Chairman of the Board

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David A. Snipes President & CEO

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Methodism might as well be part of Philip Howard's DNA. First of all, the 21-year-old is a preacher's kid two times over: both his mother and father pastor churches in the Western North Carolina Conference. And secondly, he chose to attend college at Pfeiffer University, a United Methodist-related institution of higher learning, in Misenheimer. It's one of the best decisions he's ever made.

When both your parents serve United Methodist churches, "you want to go to a United Methodist supported school," Philip explains. "It's an in-your-blood type of thing." He liked Pfeiffer because it was small and close-knit, with lower class sizes. "I wanted a school where I could make a name for myself. At a larger institution, you're just another number. At a smaller school, they make it more personal."

Pfeiffer became a reality for Philip with the help of the Quadruple Your Dollars for Scholars Program, a partnership between the United Methodist Foundation of Western North Carolina, Inc. and the United Methodist Higher Education Foundation. "I've received the scholarship every year since freshman year. It's one thing that has helped me pay for school the most. Going to a Methodist-supported school, and being Methodist myself, has helped me achieve a great education. I wouldn't trade Pfeiffer for the world in all honesty."

Great, indeed. Philip has been on the Dean's List seven out of eight semesters. This spring, he'll graduate from Pfeiffer with a degree in Communications. And he wants to use it for good in the world. "What I really want to do is go into mediation and conflict management. I've taken a couple of classes in it, and that's what interests me most." He's in the process of exploring graduate programs, including UNC-Greensboro. Philip is open to where further studies could lead him, be it a sacred or secular setting. "It all depends on where the Lord takes me."

Philip has been heavily involved in campus life at Pfeiffer. He's served as a Resident Assistant for Residence Life, and this year he's been a Quad Director, supervising 15 RAs and four residence halls. For the last two years, Philip has also been president of the Pfeiffer Student Body. It's been a chance for him to grow as a leader, and to gain experience in the field of conflict management that he's so passionate about.

Pfeiffer has also been a place of spiritual growth for Philip, stretching his views and ideas in a safe environment that is also quite diverse. "You can explore your faith and really understand others' too. We have people who come from all different backgrounds. It's not uncommon to see our Muslim students and students of other religious backgrounds worshiping. We have world religion classes that have been really interesting, that help you see religion in broader terms and how it works in today's society. That's one thing that I've really been able to explore." For those who want to discover more about their faith, there are fellowship groups of all kinds – and the possibilities are endless. "You can create opportunities," Philip explains.

There's no doubt that he's done that during his four years at Pfeiffer. The United Methodist Foundation is pleased to be in ministry with Philip and with Pfeiffer.

Where the Lord Leads

scholarships Philip Howard, Class of 2014 Pfeiffer University, Misenheimer



A Revitalization Moment

campus ministry development Rev. John Weaver Auburn Wesley Parish, Ala.





Even over the phone, the Rev. John Weaver exudes energy, enthusiasm, and love for God and the people he serves. "I'm as Methodist as the day is long," he laughs. Weaver brings that energy to the Reynolds Academy for Campus Ministry, created and administered by the United Methodist Foundation of Western North Carolina, Inc.

Weaver, 31, came to Auburn University in 2012 to serve on its Wesley staff. He applied for a spot in the Ministry later that year, and is one of 25 campus clergy leaders from around the country. It is the first Reynolds Ministry specifically for campus ministers. "Their ministry is crucial to United Methodism," says the Rev. Dr. Elizabeth Coppedge-Henley, Executive Director of Reynolds Ministries at the United Methodist Foundation. "College campuses are fertile fields for making, and keeping, disciples for Jesus Christ. Our Wesley pastors are invaluable to the students: they meet them where they are and help lead them to a renewed faith in Christ. If the Reynolds Ministry can make their efforts even more effective, we are all for it."

The Academy for Campus Ministry is comprised of modules planned and led by campus ministers. Weaver says that connection has meant a great deal. He describes campus ministry as two sprints that parallel the school calendar: August to December and January to May. "The timing of the modules has been really well done. It's led by clergy who know the seasons instead of the top down approach. I really appreciate that." Their first module took place in July 2013 in Greensboro, Ga., where their topic was servant leadership and the story of Mary and Martha. Weaver calls it a "revitalization moment" right before the new school year began. The timing was perfect. "We were being called back to the powerful roots of our faith. It really set that right in my soul."

meaningful. "We were in the middle of the semester, when you start feeling the fatigue. Now I have completely been revitalized when it comes to life of prayer. And again, it wasn't brand new – it was calling me back to where I came from."

In May 2014, the class will journey to Israel with Dr. Alyce McKenzie of Perkins School of Theology. Then, they will gather in Chicago in October 2014 for a Multiplying Ministries Module, focusing on how to recruit campus volunteer leaders.

In October, they met at the Brooklyn Tabernacle, where the gathering centered on prayer on campus. Weaver found this particularly

At Auburn, Weaver serves as the director of the Auburn Wesley Parish, a ministry that he has helped to build. The parish is made up of four local churches within 15 minutes of the campus. Undergraduate Auburn Wesley students serve as student pastors of the congregations, preaching and offering pastoral care. Weaver calls it a campus ministry cooperative parish. "We said: What would it look like to be able to have a place for discernment for students? It would be great if there was a field education moment for undergraduates." Weaver serves as the lead pastor of the parish, mentors the student pastors, and serves other Wesley students on campus. "It's a lot of fun, a lot of work, but good work. One minute I'm having a conversation with a college student who just broke up with her boyfriend, the next minute I'm working with the spiritual development of a 92-year-old. Every day is fun if you're switching hats."

Weaver recognizes the impact the Reynolds Ministry can have on any pastor. But he celebrates the opportunity it specifically offers pastors who work with young adults, a demographic that often leaves the church during college. "The beautiful part for me is that we're catching both lay and clergy leaders at a stage in which they can really develop, grab hold of these foundational things and be invited into this process. The reach of what we're doing can extend. We're catching people at the perfect time."

For participants in the Academy for Campus Ministry, accountability is key. In small groups, each pastor shares what Weaver calls

For participants in the Academy for Campus Ministry, accountability is key. In small groups, each pastor shares what Weaver calls their "dashboard numbers," referring to how many people – students or congregants – participate in the various ministries.

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In September of 2013, Bethel United Methodist Church took an important step toward building its vision for the future. The Franklin, N.C. church and its pastor, the Rev. Matthew Morris, decided to invest their building funds with the United Methodist Foundation of Western North Carolina, Inc.

Morris, 38, became Bethel's first full-time pastor in 2012. The church, located just outside the center of Franklin, has 176 members. Close to 120 people turn out for worship every Sunday. "We've seen a lot of growth over the past year and a half," Morris says. That growth has brought the desire to resurrect a building project that's more than a decade in the making.

Since 2006, Bethel United Methodist Church had raised money to build a Family Life Center on their campus. By 2008, they had amassed \$350,000, but there was still a long way to go. And then the Great Recession hit. "When the economy crashed, those plans were put on hold," Morris says. "The congregation had held on to the \$350,000 in a local bank account, collecting very little interest."

During his first year at Bethel United Methodist, a church member told Rev. Morris that she had chosen to invest her personal finances with the United Methodist Foundation. She encouraged Morris and the church's Finance Team to explore that option. At the 2013 Annual Conference in Lake Junaluska, Morris connected with the United Methodist Foundation and discussed their investment ministry offerings. Two important elements of the Foundation's Development Fund struck him right away. First, the UMF's investment rate of 1.5% was better than the local bank they had been using. Secondly, the liquidity was flexible; the church would be able to access their money at any time. "It was an incredible bonus that it was an organization through the United Methodist Church, as opposed to being a local bank or lending organization. That was special to us," Morris says.

Morris worked primarily with Christian Burns, the Foundation's Executive Director of Client Relations and Cultivation. Burns and the UMF provided Morris with important information that he in turn presented to Bethel's Finance Team. In September of 2013, Bethel United Methodist Church invested just under \$350,000 in the Foundation's Development Fund. The relationship between the church and the Foundation has been so positive, Morris says, that retirees in the congregation have begun transferring their money to the UMF individually. "We've all started to embrace how well the organization is run."

And the future is looking bright. "Now that we know we have the money well-invested, we are re-forming our building committee for the Family Life Center," Morris says. They hope to begin construction by the end of 2014. "The whole process – how the Foundation dealt with us, how they deal with the interest that comes in – is what led us to them. In hopes of planning and borrowing in the future, this was the best organization."

With the help of the United Methodist Foundation, Bethel United Methodist Church is building a place that will build up disciples. It's hard to imagine a greater purpose.



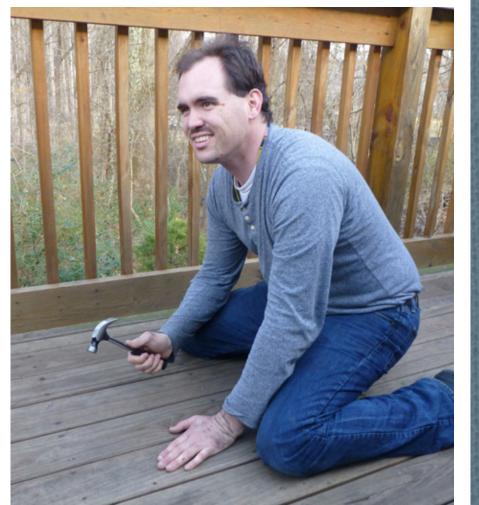
Home Sweet Home

endowment development Marilyn Garner, President UMAR, Huntersville









In 2011, UMAR partnered with the former Lake Norman District, Mt. Zion UMC and the Wesley Community Development Corporation to establish the Disciple Home in Cornelius and to make the dream of independent living a reality for adults with developmental disabilities. Founded in 1983 by The Western North Carolina Conference of the United Methodist Church, UMAR is a nonprofit organization dedicated to promoting community inclusion, independence and growth for more than 380 people with intellectual and developmental disabilities throughout North Carolina.

The Disciple Home was UMAR's first independent living facility and has proven itself as a place where residents like Joey Beatty learn necessary life skills. UMAR staff visited at first, teaching the residents lessons on dividing chores, buying groceries and creating a budget: all tools to build the foundation for an independent life. The Disciple Home offers residents an opportunity to take an active role in their futures.

"In fact, one current resident helped build the home, along with volunteers from the former Lake Norman District," says Marilyn Garner, president and chief executive officer of UMAR. "Today, Joey keeps his building skills sharp by working with UMAR's home maintenance crew. The Disciple Home gives him security, independence and a chance to grow."

The Disciple Home is a shared ministry that former Lake Norman District churches have rallied around. With the help of the Wesley Community Development Corporation, the house was built to the standards of the Americans with Disabilities Act, including wheelchair ramps and easy-access showers, but the house is also designed with energy efficiency in mind. A United Methodist nonprofit community housing organization, the Wesley CDC, builds this kind of affordable, energy efficient home for low-income individuals and families while providing home ownership training and community support. Mt. Zion United Methodist Church, located nearby, owns the land and leases it to UMAR for \$1 a year.

When the districts were realigned in The Western North Carolina Conference and The United Methodist Foundation of Western North Carolina, Inc. was called in to create an endowment to provide for the future of the home and its residents. "Because they could no longer support the home, the churches of the former Lake Norman District wanted to ensure a security net was firmly in place to support the home in the future," says Garner.

"The endowment established for the Disciple Home is a perfect example of providing ongoing financial support in perpetuity. The home was built through great Methodist partnerships and the United Methodist Foundation is continuing that tradition."

Endowment development through the United Methodist Foundation provides a way to fund ministries like UMAR's Disciple Home for future generations, ensuring that residents like Joey can always find a home here.

Over the past 15 years, the Royce and Jane Reynolds Program in Church Leadership has guided many United Methodist clergy into more effective leadership, a greater self awareness and time for reflection and renewal. In 2013, this program was expanded with the addition of a new initiative - "Adding On" continuing education classes for program alumni.

"The goal of the Add-On programs is to extend and expand the learning that happens during the Reynolds program," says Russ Moxley, one of the program guides. "The Reynolds Program in Church Leadership covers fundamentals of leadership in the local church and what it means to be an effective clergy leader. Every clergy person could benefit from this program."

This extension of the Reynolds Program builds on that universal foundation with targeted classes on specific, need-based topics. "The Adding On programs are designed to supplement and target with topics like building alignment with a new direction which would be appropriate for a leader whose church needs to restore and revitalize," Moxley says. Other topics in the inaugural classes included "Moving from Maintenance to Mission" and "Managing Multiple Staffs."

"I believe that learning is an ongoing, lifelong process. A one-year program, no matter how good and effective, is not sufficient. We must continue to learn change over the course of our life and ministries," says Moxley. "If we can do something to foster the ongoing development of clergy leaders, that was our focus and goal of this initiative. It's deeply integrated with the Reynolds Program. We were very intentional about the building block process and expanding the work of the program."

The anecdotal response has been overwhelmingly positive, proving the Adding On programs are meeting a need for the alumni who attend. "The right programs for the right people at the right time. That's the key. Are we attracting the right people for the right purpose? For something they really need to learn to be more effective in their churches today," he says. Often, a specific need isn't realized until the leader is already in the situation. That's where the Adding Ons come in, providing the appropriate guidance and training at the time needed.

The ultimate goal is to build healthier and more vital churches by supporting the leaders of those churches. "What we're really focused on is enhancing the leadership capacity of the men and women who serve the church. We focus on the person and how that person can have an impact on the church," Moxley says.

"Our belief is that if we enhance the leadership capacity that the church will also benefit. Having a staff that functions more effectively, having a clergy leader who has a clear sense of what it means to lead or implement a new vision has a direct impact on the church itself. All of the skills and perspectives we are teaching, the clergy leader can use to make a real difference in the life of the local church."









We're Not Alone

a place to gather and connect Rev. Alexis Anthony, Greater Vision UMC, Charlotte Rev. David Snipes, UMFWNC, Huntersville



Sometimes, a building is more than a building. Sometimes, a building is a vision created, a hope realized, a future anticipated.

For the United Methodist Foundation of Western North Carolina, Inc., that's exactly what their current Huntersville location has become: a place where the Foundation's mission of "Building the church for generations to come" is born anew each and every day.

Greater Vision United Methodist Church, a church plant launched in 2003, has experienced this mission firsthand. "For the first five and a half years, we were a strong and consistently growing faith community, without a place to call home," says Alexis Anthony, founding and current pastor of this predominantly African American congregation.

The congregation made several moves, meeting in the fellowship hall of another church and making use of space on the campuses of UNC-Charlotte and North Mecklenburg High School. Even as they continued to experience steady growth, location consistently presented a "logistical nightmare," he says.

After years of moving and making flawed spaces work, a property presented itself. Upon closer inspection, it appeared to be the perfect place for this young, thriving faith community. "If it had not been for the support of the UMF Development Fund and UMF Loan Program, we would not have been able to purchase our current facility," Anthony says. "Over the past five years, many have come to know Jesus as Lord of their lives and become faithful disciples because of this partnership."

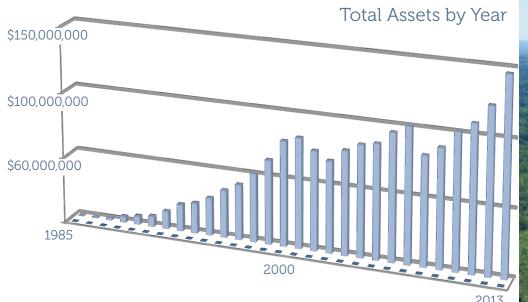
"The UMF team has shown us great generosity and hospitality and has played a vital role in making Greater Vision's dreams become a reality," he continues. "David Snipes has come to Greater Vision and spent time with the finance team in hopes of encouraging and enlightening them with information that has helped birth our new stewardship team."

Greater Vision holds Stewardship Team Training Retreats, as well as its annual Women's Weekend Conference, at the UMF building in Huntersville.

"It has been a dream of the Foundation since its beginning to have its own office in hopes that it would not only be a sign of our successful ministry, but also provide a space in addition to the Conference Center where people from throughout the conference could hold meetings and retreats," said President David Snipes.

Since construction and moving into the building in 2010, the Foundation has seen this expectation become reality. "It is not uncommon for us to host various conference, district and local church meetings as well as Foundation board

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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
- 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. is a qualified 501(c)(3) incorporated in the state of North Carolina. We do not engage in taxation or legal advice. It is recommended that all clients of the foundation seek tax and/or legal advice from their respective accountant and/or attorney prior to engaging in any contractual relationship.

Past performance of the foundation's fund options does not guarantee future returns.

Investments in the foundation's fund options and UMF Development Fund are not FDIC insured.



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Rev. Dr. Earl Wilson

Rev. Jamie Armstrong

Rev. Faye Herbin

Dr. Boyd Holiday

Mr. Bill Johnson

Mr. Wade Loftin

Mrs. Pat Wiseman

Mrs. Caroline Wood, ex-officio

Rev. David Snipes, Staff Liaison/ex-officio

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A Revitalization Moment

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Dashboard numbers help to measure effectiveness and show change in a ministry over time. "It goes back to Mr. Reynolds," Weaver explains. "The heart of these small groups came from when he and a group of Pontiac salesmen would gather twice a year and talk about best practices. They supported each other, challenged each other. We do the same thing. It's about trying to be accountable and effective. This is a place for us to be honest and vulnerable. This isn't about us – it's about how we can grow the kingdom of God."

The Reynolds Academy for Campus Ministry also gives campus ministers a place to connect and grow in fellowship together. "Unfortunately, a lot of clergy live in isolation," Weaver says. "There may be one campus minister in a district, only three or four in an entire conference. Schools are probably geographically spread out. When we get together it's such a wonderful thing. Each of these campus ministries has a little different vision." And between gatherings, their camaraderie remains. "My small group was texting about some prayer requests this morning." They share not only about their ministries but also about their personal lives. "It's great to hear other campus ministers tell how they maintain their lives with their families, their spiritual disciplines. There are several of us who are having kids at the same time. It's great to have that connection outside of what we normally would have had," Weaver says.

"You've got a group of people in the same kind of system and the same kind of season. It's been a life changing thing for me. It has helped me understand how I can lead and do this for a long period of time."

We're Not Alone

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and team meetings in the conference room," Snipes continues. "This space can be configured in various ways, offers current technology and opens onto a spacious deck with multiple tables overlooking wetlands – a perfect place for a morning meditation or an afternoon breakout session."

And also the perfect place to continue building the church for generations to come.

"Two are better than one, because they have a good reward for their toil. For if they fall, one will lift up the other; but woe to one who is alone and falls and does not have another to help."

-Ecclesiastes 4:9-10 (NRSV)





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