

CELEBRATING GENEROSITY

2014 Annual Report | United Methodist Foundation of Western North Carolina, Inc.





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.

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A MESSAGE FROM

CHRIS DAVIS
Chair of the Board

DAVID SNIPES
President

DEAR FRIENDS OF THE FOUNDATION,

This year's annual report is titled *Celebrating Generosity*. As we reflect back on the ministry of the United Methodist Foundation of Western North Carolina, Inc., we hope that all our ministries celebrate the generous nature of our Creator God.

In 2014, the Foundation was pleased to work with our resident bishop, Larry Goodpaster, in creating a conference-wide emphasis of vital congregations being generous. Throughout the year, we offered various programming and events that helped United Methodists in western North Carolina focus on generosity within their local congregations beginning with an event in March held at Myers Park United Methodist Church where Lovett Weems shared his insights and wisdom related to generosity on a corporate level through an event titled *Funding Your Congregation's Vision*. Mid-year, we called attention to Central United Methodist Church in Concord as they earned our UMF Stewardship Challenge award, thus being given a \$1,000 grant to be used for stewardship education within their congregation. The year closed with the creation of *Money \$ense*, a stewardship study that provided sermon starters, children's sermons and scripture that promoted generosity on an individual level. As well, we offered financial assistance for those wishing to purchase the congregational stewardship

program, *The Pyramid of Christian Generosity* created by Rev. Andy Langford and Rev. Dr. Mark King and funded through a grant offered by the UMF Stewardship team. Our hope is that you can see how your Foundation is committed to not only helping churches in our conference focus on being the best stewards they can possibly be with the resources provided by God, but also through the creation and funding of programs such as these, we are celebrating the generosity bestowed upon us.

On the following pages, you will find stories related to ministries of the Foundation. Whether they are about endowment development, fund management, planned giving, leadership development or the distribution of grant monies to fund ministry, you will find that they all fall under the umbrella of faithful stewardship. These ministry offerings are provided and considered an honor and a privilege that helps us to fulfill our vision of building the church, corporately and individually, for generations to come.

If you currently allow us to participate in your ministry, thank you! We look forward to working with you for years to come. If you are yet to become familiar with our ministries, we hope this annual report is helpful as we share stories of corporate transformation and individual growth.

Celebrating generosity...not only our own, but most importantly, God's!

Celebrating generosity...not only our own, but most importantly, God's!

STORIES OF GENEROSITY



KEN GARFIELD
Editor

THANK YOU FOR EMBRACING THE 2014 annual report of the United Methodist Foundation of Western North Carolina, Inc. On the pages that follow, we celebrate the generosity at work in United Methodist hearts and houses of faith – generosity made possible through the support of the Foundation. As Board Chair Chris Davis and President David Snipes reflect earlier in this report, the hope is that “all our ministries celebrate the generous nature of our Creator God.”

Turn the page for stories of faith, love and generosity...

Bill and Wanda Musgrave of Providence United Methodist Church in Charlotte created a permanently restricted endowment fund through the Foundation so that their lives might have meaning beyond their years.

Matthews United Methodist Church, already alive with many members and ministries, started the new 801South service because there are still more people with whom to bring to Christ. A Reynolds Ministries Fund grant from the Foundation makes it possible.

The Foundation and Board of Ordained Ministry are teaming up to help new clergy manage their money as effectively as they manage their considerable gifts for ministry.

With the help of a loan from the Development Fund, Mount Pleasant United Methodist Church in Cabarrus County freed up money to do God’s work in this need-filled world.

There’s more inside: Stirring stories, vivid photographs, inspiring quotes on the nature of generosity, and vital information on the Foundation’s services and objectives, leadership teams, and scope of its managed assets.

Foundation President David Snipes summed it up best. Participating in an Appalachian District dialogue on how to move from a survival mentality to a spirit of generosity, he said we must turn to God: “First and foremost, the message needs to be, ‘All we have and all we are is of God.’ We are called to be stewards of the blessings, financial and otherwise, that God has provided.”

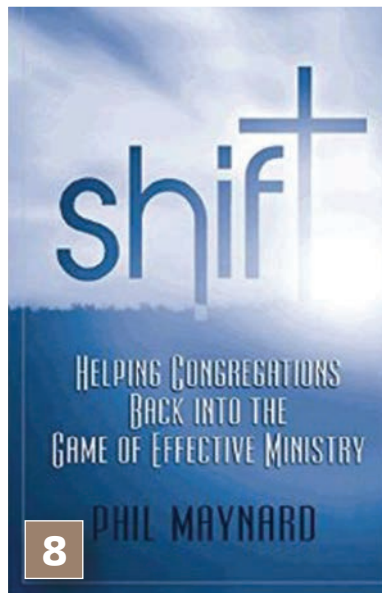
Thank you for joining us as we celebrate generosity and praise God, always.

THEY MADE IT POSSIBLE...

Thanks to the entire **Foundation staff** for making this annual report possible, and to the **churches, clergy and laity** of the Western North Carolina Conference for sharing the stories and photographs that grace these pages. **Ken Garfield** served as editor of the report. Former religion editor of *The Charlotte Observer*, he is Director of Communications at Myers Park United Methodist Church in Charlotte. His colleague at Myers Park, Assistant Director of Communications **Melissa McGill**, helped with the writing. She previously directed communications at Weddington United Methodist Church and has helped cover Annual Conference at Lake Junaluska. **Bill Walton**, a Myers Park member with a passion for photography, took pictures for several stories. Freelance designer **Christine Long** is responsible for the clean, crisp look of the annual report.



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STORIES YOU'LL SEE INSIDE...



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"We make a living by what we get, but we make a life by what we give."

- WINSTON CHURCHILL

LEAVING A LEGACY

story **KEN GARFIELD**

IN SUMMARY

Stewardship and planned giving at work:

Bill and Wanda Musgrave have created a permanently restricted endowment fund at the Foundation to benefit Providence United Methodist, their work in Haiti, and the Salvation Army Boys & Girls Club in Charlotte.

Partnering with the Foundation, Bill and Wanda Musgrave are passionately determined to make sure the blessings of their life outlive them.

In 2014, the Charlotte family established the William and Wanda Musgrave Endowment. The permanently restricted endowment will be administered by the Foundation, with income supporting three causes: Providence United Methodist, their church home for more than 30 years; their work in Haiti, which focuses on health, education, economic development and providing clean water; and the Salvation Army Boys & Girls Club in Charlotte. Grants will be awarded while the Musgraves are alive and well and serving as God's hands and feet. But their prayer and intention is that the fund outlive them, its financial support for righteous causes serving as a legacy.

All this comes as the tangible answer to the question the Musgraves took to the Lord: What can we do with the blessings we have been given that will last beyond our lives?

Bill and Wanda Musgrave smile when he says he's "semi-retired" from the automobile industry, since he's still the busy majority owner of five N.C. dealerships. His imprint is on those businesses in more ways than customer service: Through their initiative, *JustWater4Haiti*, they partner with their dealerships in soliciting funds to build wells in this beautiful yet impoverished nation. Serving in Haiti has been a "life-changing experience" for both Bill and Wanda Musgrave. Each time we travel to Haiti, Wanda says, we know that God is working in our lives and in the lives of Haitian friends and partners.

The Musgraves have long been familiar with



Wanda Musgrave, front center, in Haiti in 2013:
"I want my life to have meaning beyond me."

the Foundation and the importance of planned giving: Wanda serves on the Board of Directors and the Reynolds Ministry Team. Bill chairs the Endowment Committee at Providence United Methodist, a role through which he has learned to value the Foundation's deep Methodist roots, strong staff and sound financial advice. Yearning to transform their blessings into a legacy, there was only one place to turn. "The Foundation," Wanda Musgrave says, "is a wonderful steward of the church and the people who have chosen to be their partners."

The Musgraves have two grown sons and four grandchildren, all of whom are first and foremost in their financial planning for the future. But the Musgraves' faith calls them to see their neighbors as brothers and sisters, whether around the corner or across the ocean. The William and Wanda Musgrave Endowment responds to Christ's call on their lives.

Bill Musgrave: "To me, it sounds corny, but this makes me happy."

Wanda Musgrave: "I want my life to have meaning beyond me."

Bill and Wanda
Musgrave.



“For it is in giving that we receive.” - ST. FRANCIS OF ASSISI

JOURNEY TO GENEROSITY

story **KEN GARFIELD**

IN SUMMARY

With the Foundation's counsel, Appalachian District churches are moving from a survival mentality to a spirit of generosity when it comes to stewardship.



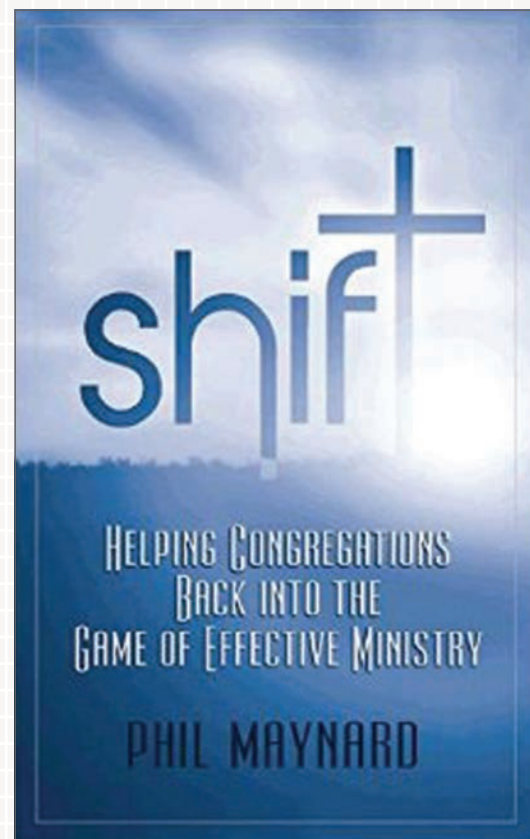
HUFFMAN

A movement is growing in the mountains of North Carolina.

With the Foundation serving as mentor and inspiration, Appalachian District congregations are looking at stewardship in a new way. As Rev. Lory Beth Huffman, the District Superintendent, puts it, the journey is taking Methodists from a survival mentality to a spirit of generosity, from paying the bills to seeing stewardship as a way to bring God's hopes and desires for ministry to life. "Too many of our churches are hunkering down," she says. "They're not excited about what they're doing with their money."

That's changing, with the help of the Foundation and district dialogues focused on author Phil Maynard's book, *Shift: Helping Congregations Back Into the Game of Effective Ministry*. Moving from survival mentality to generosity is one of the five themes that the book challenges the faithful to explore. Even in a district with mountain poverty, the message is being heard.

Foundation President and CEO Rev. David Snipes and Rev. Dr. Elizabeth Coppedge-Henley, Executive Director of the Foundation's Reynolds Ministries, attended the Appalachian District dialogue. They shared practical ways that churches can help the faithful buy in to stewardship, among them: Offering personal financial planning workshops, being as transparent as possible with annual operating budgets, supporting church leaders in talking openly about stewardship, and focusing more on actual ministry than the money it takes to turn our best intentions into our best practices.



The larger message of the dialogue is clear and powerful, says Snipes:

"First and foremost, the message needs to be, 'All we have and all we are is of God.' We are called to be stewards of the blessings, financial and otherwise, that God has provided...What people seemed to embrace (at the dialogue) is the fact that when the individual is a sound steward with his or her financial resources, this has a positive effect."

CONNECTED IN CHRIST

story **MELISSA MCGILL**

IN SUMMARY

Madison United Methodist Church has taken advantage of the Foundation's investment and other services to expand its work in the world.



MUCKLER

For Madison United Methodist Church and Rev. Mark Muckler, connectionalism is an integral part of ministry, mission and finance, thanks largely to the United Methodist Foundation of Western North Carolina.

"It's a special connectional relationship with a financial institution that you don't get with a bank or other lending institution," Muckler says. "They understand our mission and our purpose to be the church of Christ in the world in which we live. Being in conversation with them about money issues has been a blessing."

The church received a loan from the Development Fund to buy an older building with a storefront in the small town of Madison, and has high hopes for how this new building will impact outreach. Madison United Methodist is involved in a missional network in the Northern Piedmont district, working with 17 other United Methodist congregations and Second Harvest food bank to fill backpacks for local elementary school children. This new building allows much-needed space for packing and storage. Also, within the community of Madison, the church is considering hosting an ecumenical community food pantry since they are outgrowing the current location at the Baptist church.

The Foundation has also helped in the church's investment strategy and stewardship



The Foundation, says Rev. Mark Muckler, "understands our mission and our purpose..."

education. "Money can be a big source of conflict and questions within the church. (President) David Snipes was more than willing to drive up to Madison and spend a couple hours with our key leadership to help us understand our options, which has been very beneficial."

The mission of Madison United Methodist is as the body of Christ, to proclaim the Good News of Jesus Christ as Lord, instruct individuals in the faith, so they can grow spiritually and morally strong; nurture and care for one another, to build up the body of Christ; and serve those in need, simply because they are in need. With the Foundation's help, the congregation is better equipped to do just that.

EMERGING GENERATION

story **KEN GARFIELD**

IN SUMMARY

Supported by the Reynolds Ministries Fund, Matthews United Methodist Church in Mecklenburg County is reaching the unchurched through its 801South service and other initiatives.

With the Foundation as a passionate partner, Matthews United Methodist Church is finding new ways to introduce Christ to those who might not know Him.

The 4,000-member congregation has long hummed with ministry. Now it's humming with new opportunities aimed at what Rev. Ken Lyon calls the Emerging Generation. Those are Christians ages 16 to 35 who have been left cold by more traditional forms of worship – but whose hearts warm to the informal, high-energy offering of 801South.

Launched last year in the newly renovated gym, the 801South service draws 200 or so each Sunday at 11:00 a.m. Lyon says the service features a young communicator in Rev. Stephen Knopp, high-tech multimedia, upbeat music, and pop-up tents where people can find information on the church and volunteers eager to talk.

The Foundation has played a pivotal role in 801South and other efforts across the Conference, for as Lyon says, “Their goal is to make the local church more effective in local ministry. I’ve found them to be an incredible partner.”

A Reynolds Ministries Fund grant of \$25,000 was awarded to Matthews United Methodist for 801South. It was used to renovate the gym to accommodate the service, as well as to refurbish the fellowship hall known as The Commons. That area has become a gathering space for people to get to know each other, and build relationships one warm conversation at a time. Rev. Dr. Elizabeth Coppedge-Henley, Executive Director of the Foundation’s Reynolds Ministries, says the Fund supported eight churches that started new, innovative

worship services in 2014 with a combined gift of \$139,500. Grants ranged from \$7,000 to the \$25,000 that helped bring 801South to life.

Still more initiatives at Matthews United Methodist are aimed at a nontraditional constituency, with the Foundation offering encouragement for efforts like these:

- The Deep is a kid- and parent-friendly worship service that meets at 9:30 a.m. on the second Sunday of each month in the gym.
- Centro Cristiano Hosanna is the Spanish-speaking ministry of the church that worships Sundays at 12:30 p.m. in the Sanctuary.

Lyon, who has served as Matthews United Methodist’s senior pastor since 1995, has served for a decade on the Foundation’s Reynolds Leadership Academy for Evangelism & Discipleship. Launched in 2006, the peer leadership program offers 25 ordained Western North Carolina Conference clergy the opportunity to meet three times a year over two years to celebrate the joy and challenges of ministry, with a focus on “How can we do better at bringing people to Christ?” Lyon serves on the Steering Committee.

All of this, says Lyon, from the energy of 801South to Leadership Academy conversations over coffee, focuses on the fundamental question for churches laboring in challenging times: “How can we help people find that connection to Christ? We have to be open to new ways to do that.”

Lyon’s congregation is eager to help other United Methodist congregations. Matthews United Methodist is available to consult, host on-site visits and share best practices.

The 801South service
at Matthews United
Methodist Church.



“In all this I have given you an example that by such work we must support the weak, remembering the words of the Lord Jesus, for he himself said, ‘It is more blessed to give than to receive.’” - ACTS 20:35

NEW CHURCH CULTURE

story **KEN GARFIELD**

IN SUMMARY

Foundation support in the form of a Reynolds Ministries Fund grant is helping Unity United Methodist in Thomasville transform itself into a multicultural community of faith.

A simple question posed by a handful of laity has inspired a once-struggling congregation to live up to its name.

Buoyed by a grant from the Foundation's Reynolds Ministries Fund, Unity United Methodist Church in Thomasville has opened its doors and heart to members of the Hispanic community who are new to the region. It began with a few laity asking, "Why aren't we doing anything for our neighbors?"

Unity faced the challenge brought on by changing demographics in their neighborhood. Rather than cling to the old ways, as too many others have done and declined as a result, this congregation embraced the cause of becoming multicultural. Rev. Rob Hutchinson put it this way in the 2014 application seeking the Foundation's financial support: "We believe God is creating this new church culture in our midst, one where we do things together."

Talk about Mission Accomplished, a \$20,000 Reynolds Ministries Fund grant helped jump-start "doing things together" in a number of inventive ways. In 2014, the Reynolds Ministries Fund awarded more than \$357,000 to 26 congregations and ministries. Rev. Dr. Elizabeth Coppedge-Henley, Executive Director of the Foundation's Reynolds Ministries, says, "The purpose of the grants is to make disciples for Jesus Christ by supporting innovative ministries aimed at reaching those in our communities who have not experienced God's welcoming grace, yet. Every year, we welcome grant applications that not only have great ideas for ministry, but also the will and ability to implement new ministry. We are

grateful to Royce and Jane Reynolds for their inspiring commitment to disciple-making."

At Unity, the Reynolds Ministries grant specifically helped pay for new digital signage outside, so the church can share its good news in Spanish and English. There's more: English as a Second Language (ESL) classes for Hispanics, and Spanish as a Second Language (SSL) classes for non-Hispanics. Free child care offers everyone a chance to learn another language. Worship services and the Sunday bulletins incorporate English and Spanish. A free block party, called *Unity Live*, shared American and Latin food and the beat of a Hispanic praise band. Bibles and other printed material are offered in Spanish. A Spanish-speaking Bible study group meets regularly. There are scholarships so Hispanic youth can go on summer trips. Unity hopes to develop a mission outpost in Thomasville's Hispanic community by renting a house and training a Hispanic couple to move in and do ministry.

Good news indeed. The congregation, now at 260 members, has experienced an increase in attendance and a growing eagerness to look beyond the church to a world that needs them. Long-time member Peggy Wessel especially loves the Children's Moment at Sunday worship, and hearing new, young voices fill the sanctuary. "The church probably would have closed the doors," she says. "This has given us new life. This is our neighborhood now. We're a part of the community and they're a part of us."

As Hutchinson put it, thanks to the Foundation's support, "Renovation, transformation and redemption are just around the corner."

Faith, fellowship at Unity
United Methodist Church.



“No one has ever become poor by giving.” ~ ANNE FRANK

FROM DEBT TO MINISTRY

story **KEN GARFIELD**

IN SUMMARY

Refinancing its loan through the UMF Development Fund has resulted in Mount Pleasant United Methodist Church being able to devote more money to ministry.

With the help of the UMF Development Fund, the math is adding up to more ministry at Mount Pleasant United Methodist Church.

The Cabarrus County church is enthusiastically expanding its role in the community, buoyed by a loan through the Foundation's Development Fund that has freed up more money for programs and outreach. Here are the numbers: The church borrowed \$2.1 million from a local bank to build a new worship center and add Sunday School and other needed space. The expansion opened in 2011, quadrupling the church footprint and allowing a contemporary service and other offerings that have struck a particular chord with children, youth and young families. Now possessing the largest gathering space in Mount Pleasant, the 730-member congregation is proud to open its doors to plays and other activities that bring the church and community together. In the midst of these exciting times, along came the Foundation to expand Mount Pleasant's opportunities to serve God and neighbor: The church received a \$1.5 million loan through the Development Fund to refinance its existing bank loan. With a lower interest rate, Mount Pleasant United Methodist is enjoying a debt savings of more than \$17,000 a year while cutting 10 years off the life of the loan.

"The money being saved," says Rev. Bruce Gwyn, "is being turned back to ministry and missions. It's allowed us to open our church to

the community rather than turn inward."

That's the vision driving the Development Fund, which provides an investment alternative for those seeking the security of a fixed-income type vehicle at competitive rates. The Development Fund, in turn, supports the Foundation's Loan Program, which provides loans to United Methodist churches and institutions throughout North and South Carolina to acquire new property; build new facilities; expand or renovate existing facilities, or refinance at lower rates for the purpose of growing ministry. Participation in the Development Fund is available to N.C. and S.C. residents as well as United Methodist churches and institutions in North and South Carolina.

At Mount Pleasant, the lower interest rate translates into a smaller loan payment. That means more money for programs like *Lighthouse*, the gathering for children and youth that offers worship, recreation and fellowship two Wednesday evenings each month. Gwyn proudly recalls the grandmother who stopped him in town one day to share how her grandson can't wait to go to church at *Lighthouse*.

Gwyn appreciates that the Foundation's good work helped give that grandchild, and others, a place to turn.

"If everyone's experience was as easy and positive as ours, wow. My hat is off to the folks at the Foundation. They want to transition the church from debt to ministry."

Reflection and fellowship
at Lake Junaluska.



“For where your treasure is, there your heart will be also.” - MATTHEW 6:21

PLANNING FOR FUTURE

story **MELISSA MCGILL**

IN SUMMARY

University City has partnered with the Foundation to create an endowment and educate the congregation about planned giving, and leaving a legacy.

University City United Methodist has big dreams for the future. That's why the 1,100-member church in north Charlotte, with an annual budget of more than \$1.5 million, has decided to partner with the United Methodist Foundation of Western North Carolina.

"In addition to member education, fellowship and discipleship, University City has a broad range of ministries that includes the expansion of God's kingdom on a local, national and international basis," says church member Tom Johnson, chair of the Endowment Committee. "Our reach has continued to exceed our grasp; and this is a good thing since it challenges each of us to keep moving forward in discipleship and the effort to build God's kingdom. Although we have been in our current location for more than 25 years, there has never been an endowment fund for long-range ministry funding – until 2014 when our endowment was formally established to assist with long-term perpetual funding of ministries in three areas: Missions, education, and capital improvements for physical facilities."

Understanding that creating an endowment was an important part of preparing the church for future ministry and growth, a committee was organized to evaluate options. That committee was unanimous in selecting the United Methodist Foundation of Western North Carolina.

"Their investment and advisory fees were competitive; their investment track record was very good, and they offered their help



Says Tom Johnson: "Our reach has continued to exceed our grasp; and this is a good thing..."

and support from day one, before we had any funds to invest," Johnson says. "The Foundation has an exceptional array of web tools for planned giving, and individual financial tools designed to help our members arrange their personal finances in proper order. These tools are available free of charge to all our members through our church website. It's hard to overstate the value this brings to the table for everyone."

For Johnson and University City, the endowment is an important part of planning for the continuity of the church and its mission, plus creating a legacy for future leaders. "By keeping a long-term perspective in mind," he says, "you'll be doing future decision-makers a huge favor and enabling them to make wise decisions concerning distribution of endowment funds."

University City United Methodist Church.



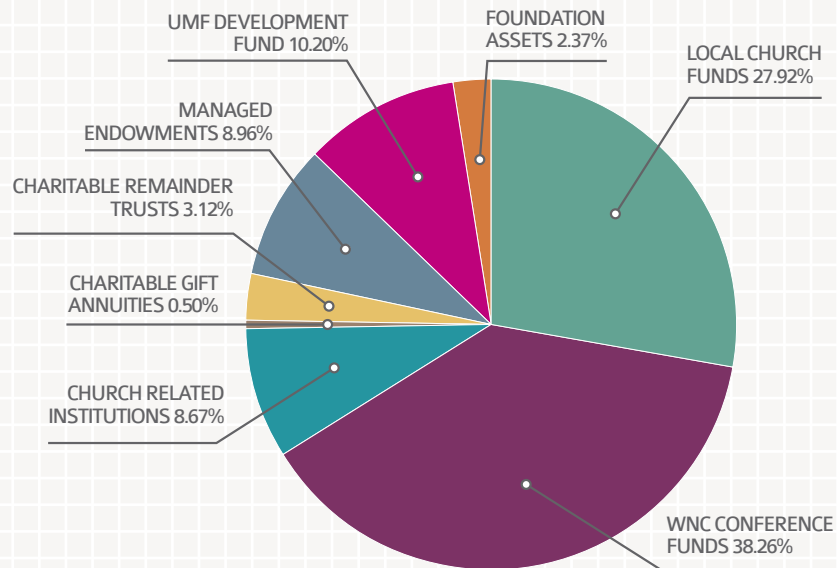
“When I give I give myself.” - WALT WHITMAN

FOUNDATION AT A GLANCE: ASSETS

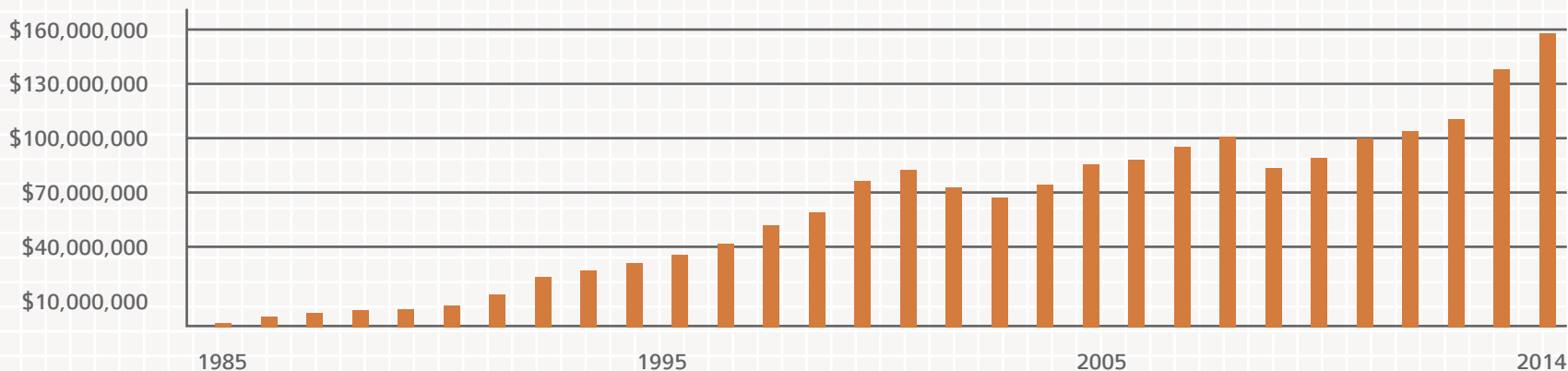
MANAGED ASSETS IN 2014

LOCAL CHURCH FUNDS	\$44,231,148
WNC CONFERENCE FUNDS	\$60,614,587
CHURCH RELATED INSTITUTIONS	\$13,740,289
CHARITABLE GIFT ANNUITIES	\$784,893
CHARITABLE REMAINDER TRUSTS	\$4,948,102
MANAGED ENDOWMENTS	\$14,189,488
UMF DEVELOPMENT FUND	\$16,166,087
FOUNDATION ASSETS	\$3,757,341

TOTAL ASSETS **\$158,431,935**



TOTAL ASSETS BY YEAR



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. Investment in the Foundation's fund options and UMF Development Fund are not FDIC insured. Independent audit provided by McGladrey. Copies are available upon request, please contact the Foundation office for additional information.

The beauty of Western
North Carolina.



“The generous man enriches himself by giving.” ~ DUTCH PROVERB

FOUNDATION AT A GLANCE: LEADERSHIP

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FOUNDATION AT A GLANCE: LEADERSHIP

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Brownie Plaster

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FOUNDATION AT A GLANCE: LEADERSHIP

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Wanda Musgrave
Sam Smith
Jody Seymour

EX OFFICIO
Chris Davis

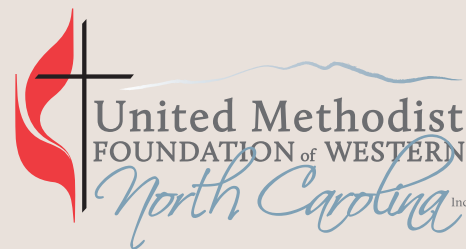
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DOLLARS AND SENSE

story **KEN GARFIELD**

IN SUMMARY

The Foundation and Board of Ordained Ministry are teaming up to help new clergy become good stewards of their financial resources.



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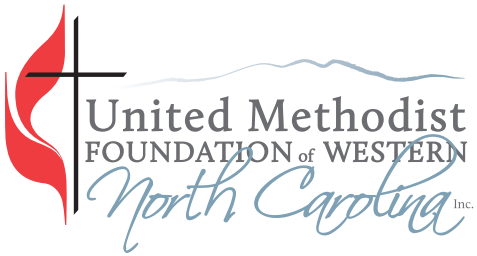
The Foundation and Board of Ordained Ministry are teaming up to help new clergy manage their money as effectively as they manage their gifts for ministry. As Rev. Kim Ingram, the Conference's Director of Ministerial Services, puts it, "The goal is to help clergy be good stewards of the blessings and gifts they have been given. If they can't do that in their own personal realm, they can't do that in a church setting."

The initiative began in 2012 when the Foundation and the Office of Ministerial Services collaborated to create a Financial Health Task Force. Among those serving on the Task Force are Rev. David Snipes, the Foundation's President and CEO, and Christian Burns, Executive Director of Client Relations & Cultivation. The mission is clear: While clergy possess such gifts as building relationships and empathizing with those in need, Ingram says, some need help balancing a household budget,

keeping good financial records, taking care of insurance and retirement needs and the like. Often this is especially true for younger clergy and recent seminary graduates.

With a daunting workload and seminary debt facts of life for many, the need for good planning looms even larger.

Looking ahead to more initiatives, the Foundation approached the Board of Ordained Ministry about a partnership on behalf of new clergy. The Board of Ordained Ministry will look to identify new clergy who would benefit from working with a Certified Financial Planner. Such a planner could help new clergy create a personal budget, for example, and manage their financial lives in a way that leaves them more time and energy to devote to the work of the church. The Foundation has set aside funds to make that possible. The goal, says Ingram, is to develop a comprehensive approach to help new clergy "from entry into the ministry through retirement."



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“Make all you can,
save all you can,
give all you can.”

~ JOHN WESLEY ~