



PARTNERS IN MINISTRY

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Message From The Executive Director

When you think of the term “stewardship,” what leaps to mind?

Tithing? Annual budget? Financial obligation?

If any of these words resonate with you, then you are not alone. A number of members in our Annual Conference share this fiscal perspective on stewardship.

The truth is, money and finances are only one aspect of stewardship. In fact, they are not even the most important aspect.

Stewardship is more than the act of giving money. **It is a lifestyle.**

The Foundation was pleased to be able to sponsor the Pre-Annual Conference Seminar, “Growing Christian Givers and Funding Ministry in a New Millennium.” The presenters from the Texas Methodist Foundation are experts on the subject and scope of stewardship.

The Nebraska United Methodist Foundation is committed to promoting stewardship education as a primary tool to help evolve the giving lifestyle of our congregations. In doing so, our goal is to inspire a culture that encourages all types of Gracious Generosity while it cultivates Disciples In Christ.

As always, we look forward to serving our churches, agencies, and individuals in any way we can.

Foundation Workshop Offers Sound Church Money Advice

BY KATHRYN WITTE

Conference Communications Director

Judy Dangler, lay person from Rosedale UMC said she learned money matters need to be shared with the congregation, we can’t just say we’re low on money. “We need to compare from year to year in our own church,” she said. “If you have trends, follow them so we can communicate what we’re doing, instead of not doing. Our big checks come at the end of the year, that’s our church (trend),” she concluded.

The Rev. Thomas Hyde from the Saint Paul, Neb., UMC said “I’m encouraged to do stewardship sermons.” He went on to say that his church is looking at extending their parking lot and he’s excited about the possibilities and the future of stewardship with his congregation.

“We need to deal with the positive, we need to be reminded that because of our giving we can do things,” was one of the take-away ideas from the workshop for Beverly Luedke from Paxton.

Close to 200 people attended the Nebraska United Methodist Foundation’s pre-Annual Conference seminar entitled, “Growing Christian Givers and Funding Ministry in a New Millennium,” held Tuesday night, June 5. The Foundation brought in James Varner, vice president of stewardship services, and David McCaskill, senior vice president

of loans, both from the Texas Methodist Foundation, to present the seminar intended to equip local churches to think and manage their financial situations with greater strategic intent and reality-based planning.

Doing ministry costs money. Some of the current challenges to raising money for ministry include:

- People earning more and giving less
- Aging donor base and generational changes
- Consumer culture
- Church relationships and ministry involvement often create a disconnect between “giver” and “receiver.”
- Church’s appeal for money is often lost on the multiple appeals for money.

The presenters pointed out that Christ related to money and possessions, as it is the second most important subject covered in his teachings. There are 2172 verses related to money, possession and stewardship—23 to 43 parables deal with stewardship.

Comprehensive stewardship is also a very Wesleyan idea. An often recited John Wesley quote is, “Earn all you can. Save all you can. Give all you can.”

Bishop Carter from Texas is known to say that we are two-thirds Methodist in that we have trouble with “Give all you can.”

Continued on page 3

Six Seminary Scholarships Awarded

The Foundation Board of Directors named the following applicants as the recipients of the Foundation-administered scholarships for 2007:

- **Zach Anderson** - *The Cowles United Methodist Church Memorial Scholarship*
- **Israel Gandarilla** - *The Andrew & Nevabelle Howe Scholarship*
- **Matthew E. Fowler** - *The Alice Kruse Ministerial Scholarship*
- **Patty Norris** - *The Baldwin F. & Amy L. Kruse Trust* (Patty currently serves the Palmyra & Cheney UMCs.)
- **Douglas Gahn** - *The Sylvia Miller Memorial Scholarship*
- **Joan Frenzel** - *The Albert R. Murdoch Ministerial Scholarship*

(Joan currently serves the Alvo & Prairie Home UMCs.)

The scholarship winners range from first-year to final-year seminary students. (Due to a lack of applicants from Iliff School of Theology, *The Alva Clark Seminary Scholarship* was not awarded this year.)

The Board of Ordained Ministry Trust Fund, held at the Foundation, also provides ministerial scholarships for students pursuing a career in the United Methodist ministry.

The Foundation is pleased to be able to provide financial assistance to these current and future Nebraska Annual Conference pastors on behalf of the donors and their families. We would like to extend them a heartfelt "thank you" for making these scholarships available.

Free Planned Giving Resource Available

The Foundation is excited to be able to offer a beneficial service to the attorneys, CPAs, trust officers, life underwriters, financial planners, and other allied professionals in our churches' congregations and communities.

The GiftLaw Weekly eNewsletter is a publication offered by Crescendo Interactive, a leader in gift planning support services. This eNewsletter provides recipients with the latest information on legislation and current events that impact the planned giving process.

The Foundation currently subscribes to this eNewsletter and would like to offer this valuable tool to the financial professionals in our congregations and communities at **no charge**. All that is necessary is an email address for recipients. (Please note that email addresses **will not** be sold or used for any other purpose other than to receive the GiftLaw Weekly eNewsletter. The Foundation is solely responsible for the maintenance of the distribution list.)

If you or anyone you know would be interested in receiving this valuable resource, please contact Sarah DeLong at the Foundation office for a sample of the GiftLaw Weekly eNewsletter: sdelong@numf.org, 402-323-8841, or 877-495-5545, option 3.

Board Member And Officers Elected

At its Annual Meeting on June 5, the members of the Foundation elected **Rev. Janice Japp** of Omaha to the Class of 2010. Rev. Japp is filling the vacancy left by Rev. Dr. William Deahl, Jr. upon his passing.

At its July 24 meeting, the Foundation's Board of Directors elected the following members as its officers:

Chair - Kim West Dinsdale, Grand Island

Vice Chair - R. David Wilcox, Lincoln

Secretary - Dwight Trumble, Springfield

Treasurer - Jim Cook, Lincoln

We would like to thank these and all the Board members for their leadership and service.

*The mission of the Nebraska United Methodist Foundation is to **support** the ministries of the local church and the Nebraska Annual Conference of The United Methodist Church through the **development** of gifts and the **stewardship** of resources entrusted to the Foundation in support of God's work.*

Foundation Workshop Offers Sound Church Money Advice

Continued from page 1 - To do effective fund raising we must tell stories. Stories of ministry in action, stories of how stewardship is helping the church, the community and individual lives. Varner said we must get to the place where we can say, "Aren't you glad you've given to a ministry like that!" It is in these successes that people are energized about the possibilities of ministry in their church.

The presenters discussed three kinds of giving. Annual Giving supports the ongoing ministry of the church and is usually operational in nature. Special Giving which is focused on mission team work, or a special one-time offering to support a ministry or project. Capital campaigns fall in the special giving category. The third type of giving is Planned Giving. Planned giving enables people to give a timeless gift in the form of bequests, gift annuities, etc.

Varner and McCaskill pointed to stewardship education as a primary tool to help change the giving culture of a congregation, "...involves activities to inform, motivate and guide people (Christians) to be faithful and growing disciples of Jesus Christ so they will pray intensely, worship sincerely, give generously, serve enthusiastically, and share the good news of Jesus Christ effectively."

Don Joiner in his book "Creating A Climate for Giving" says the paradigm needs to shift from raising money to funding ministry.

A focus on the institution of the church results in preoccupations with money, budget, member obligations and shortfall. Churches that enable God's ownership focus on ministry, results, donor relationships and possibilities.

In short, "More churches must develop a culture of generosity rather than scarcity," said McCaskill.

Other tips for success included:

- Pastors who model giving will find the

congregation following his or her lead.

- The most neglected activity in church related to giving is saying, "Thank you!"
- Churches with a mission and vision will find it easier to fund ministry.
- The need to give is more basic than the church's need for money.
- Investment in individual spiritual growth will result in more giving.
- Information without invitation produces informed members but not necessarily givers.
- Effective stewardship at the local church begins with a successful annual campaign and continues with a year-long emphasis on stewardship.



- Three commandments of stewardship ministry include keeping it positive, keeping it Biblical, and stressing the mission of the church.

- Churches should use a narrative budget to tell the story of ministry, not a line item budget in the weekly bulletin. Ministry needs story telling based on a ministry action plan.

- Capital campaigns are intended to encourage every family related to the church to pray for God's will to be done in their faith journey and in their participation in the church's mission and ministry. Second, campaigns are intended to raise as much money as possible over and above regular giving.

- Capital campaigns should include ongoing debt reduction as part of the overall financial goal of the campaign.

- Capital campaigns should celebrate the vision for ministry; cultivate spiritual growth; communicate ministry benefits of proposed projects; create opportunities for participation; and challenge people to give "over and above" regular giving.

Purposeful and intentional planning is the biggest key to ministry funding. Doing the work up front is critical to success at the end of the campaign.

THANK YOU!

The Foundation would like to thank all those who have made gifts in 2007 to various funds held at the Foundation. Their generosity is what makes the ministries of our local churches and the Conference possible.

Below, in alphabetical order, is a list of the people who have made memorials, donations, and major gifts in support of what is close to their hearts. On behalf of those whose lives will be touched, we **thank you:**

- Rev. Stephanie Ahlschwede
- Rev. Charles & Glynis Alkula
- Mel & Margaret Andrews
- Anonymous
- Isla Armstrong, Family & Friends, in memory of Dean Armstrong
- Jody & Benjamin Baldwin
- Rev. Jerald Brabec
- Marlo & Jean Burg
- Rev. Jim & Allison Corson
- Leon & Judy Dappen
- Rev. Michael & Janet Davis
- Jerome & Barbara Draucker
- Rev. Dr. Dan Flanagan
- Randy Fleming
- Revs. Brian & Lana Fong
- Anne & Douglas Gahn
- Jim & Elda Heller
- Rev. Dr. Marvin Koelling
- Alice Kruse
- Amy Leeds, *New York, NY*
- Ruby Minert, Family & Friends, in memory of John Minert
- Dr. & Mrs. Arthur Murdoch, *Atwater, OH*
- Kathy Pierce
- Virgil Roush
- Lela Shanks
- Jean Smith
- Effie Torpin
- Dwight & Bette Trumble
- UM Men of Nebraska
- JoAnn Van Fosson

Rev. John Minert Remembered Through Endowment

On June 14, 2007, Rev. John Minert, a former Foundation Board member, passed away.

Rev. Minert was a long-time supporter of the Foundation and its mission, even well after his tenure on the Board.

We are saddened by Rev. Minert's passing, and we appreciate everything he did to further the Foundation's mission and support the local churches and ministries of our Conference.

We also appreciate the opportunity to help his family perpetuate his legacy through the establishment of the "**John & Ruby Minert Endowment Fund**" within the Foundation's "Gifts From the Heart" Endowment Fund.

John's widow, Ruby, worked with the Foundation to set up this Fund, and she and their children forwarded the many memorials given by the generous people whose lives were touched by John.

In turn, these gifts will provide assistance for the greatest needs within the Nebraska Annual Conference of the United Methodist Church for years to come.

If you are interested in making a gift in memory of John, or in establishing a perpetual endowment fund in honor or memory of a loved one, please contact the Foundation. We are happy to be of service in any way possible.

Guaranteed Income During Your Lifetime, A Lasting Legacy After Your Lifetime

Charitable Gift Annuities through the Nebraska United Methodist Foundation provide a way for church members to earn exceptional income, be eligible for substantial tax benefits, and feel the joy of knowing that their act of stewardship will make a positive impact

on the future of their church, their community, and the world. Some annuitants have high net worth and large estates, but most have average, or even below average, income. In every instance, they want to use their money to do good deeds for others.

A sampling of current rates and benefits for a gift annuity created with \$10,000 follows:

<u>Age</u>	<u>Payout Rate</u>	<u>Annual Payment</u>	<u>Tax-Free Portion</u>	<u>Charitable Deduction</u>	<u>Effective Return Rate*</u>
65	6.0%	\$600	\$324	\$3,553	7.77%
70	6.5%	\$650	\$380	\$3,952	8.62%
75	7.1%	\$710	\$449	\$4,433	9.67%
80	8.0%	\$800	\$542	\$4,905	11.18%
85	9.5%	\$950	\$697	\$5,256	13.61%
90	11.3%	\$1,130	\$872	\$5,727	16.58%

**This rate represents an equivalent, fully taxable yield if in the 25% income tax bracket.*

Gift Annuities are issued in any amount of \$5,000 or more. If you, or anyone you know, could benefit from income and tax benefits provided by a gift annuity, and would like to have your church or

other ministry benefit from your gift following your lifetime, please do not hesitate to contact the Foundation for more information. We welcome the opportunity to visit with you.

Two New Investment Funds Available

Foundation Investment Funds Increase To Five

In response to requests from Conference churches and agencies that utilize the Foundation's Investment and Fund Administration Services, the Foundation has recently added two new Funds and created the opportunity for investors to establish the exact ratio of stocks and fixed income assets they desire for each of their church or agency investment accounts.

Previously, investors have had the option of selecting to be invested in the **Conservative Fund** (25% stocks and 75% fixed income), the **Balanced Fund** (50% stocks and 50% fixed income), the **Long-Term Growth Fund** (75% stocks and 25% fixed income), or a combination of two or three of those Funds.

The two new Funds are a **Fixed Income Fund** (100% fixed income securities) and an **Equities Fund** (100% stocks).

Investors can now choose to invest in any one individual Fund or can utilize percentages of the 100% **Fixed Income Fund** and the 100% **Equities Fund** to create the exact ratio of stocks and fixed income securities that they want to hold in any account.

Because a church may have (or wish to have) any number of accounts that are used for different purposes, the ability to structure each account's assets to its investment time horizon and to provide

the greatest opportunity to accomplish its purpose is of great benefit to the church. The ability for each committee or board treasurer to receive separate account reports that can easily be copied for distribution to committee or board members is extremely valuable and time saving.

As in previous years, investment funds managed and administered on behalf of Conference churches and agencies in 2006 grew significantly from the previous year. Even after requested distributions to investors, net deposits grew by **25%** to nearly \$10 million, and the average rate of return for the Foundation's Balanced and Long-Term Growth Funds was **10.34%**.

Of particular significance has been the ability of the Foundation's investment funds to match and exceed the universal benchmarks for similar types of funds over the past three- and five-year periods, while having a considerably lower risk level than similar funds.

Additional advantages of the Foundation's Investment Services include the availability of individual accounts to meet the needs/goals of each account, separate quarterly reports for each account, deposits and withdrawals at any time, immediate access to funds, socially-responsible investments, no commissions, no sales charges, no front- or back-end loads, and no surrender charges or penalties for early withdrawals.

With absolutely no cost or obligation to you, we would appreciate having the opportunity to visit with the appropriate persons, committees, or boards in your church about the services available to you.

"The Foundation can provide great potential for the furtherance of the Church and its works."

Dwight Trumble
Board Secretary

Foundation Staff



Jim Heller

Executive Director
jheller@numf.org

Sarah DeLong

Foundation Assistant
sdelong@numf.org

Rosanne McClarnon

Financial Administrator
rmclarnon@numf.org



Nebraska United Methodist Foundation
100 W. Fletcher Ave., Ste. 100
Lincoln, NE 68521
402-323-8844 or 877-495-5545
info@numf.org • www.numf.org



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To learn more about Charitable Gift Annuities, Investment Services for churches, Scholarships, or other Foundation services, please contact us at 402-323-8844 or 877-495-5545, info@numf.org, www.numf.org, or complete and return this form. Your gift in support of the Foundation's work is appreciated.

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ E-mail: _____

Church: _____ Church Phone: _____

I/we would like more information about: _____

Please: Call E-mail Send Information Schedule a visit
 A gift to help support the Foundation's work is enclosed.

**Mail to: The Nebraska United Methodist Foundation
100 W. Fletcher Ave., Ste. 100 • Lincoln, NE • 68521**