

Mid-Atlantic

United Methodist



Foundation

Empowering Stewardship to Support Ministries.

# Funding the Next Methodism(s)

Jack Brooks, Exec. Director, Mid-Atlantic Foundation

[MidAtlanticFoundation.org](http://MidAtlanticFoundation.org)

# About this Presentation

The Mid-Atlantic United Methodist Foundation is an **Independent 501 c “Not for Profit Corporation”** providing services to United Methodist Churches in the Eastern Pennsylvania, Peninsula Delaware, and Baltimore Washington Annual Conferences of the United Methodist Church.

The information presented complies with our status as a **“Certified Fiduciary”**. This designation has been granted to us by the **Center for Fiduciary Excellence (CEFEX)**. This independent CEFEX Investment Steward certification demonstrates fiduciary excellence based on our high investment standards and donor care.



# About this Presentation cont.

The information further complies with the “*Uniform Prudent Management of Institutional Funds Act (UMPIFA)* and the standards and obligations applicable to a trustee under PROBATE, ESTATES AND FIDUCIARIES: TITLES 15 & 20 OF THE PENNSYLVANIA CONSOLIDATED STATUTES with regards to the responsibilities of the directors of a nonprofit corporation or religious organization.

This presentation is intended to educate viewers with regard to the high standards that apply to the directors, trustees, and officers of a nonprofit corporation for the supervision of charitable assets and the management of donor relationships. The standard of the business judgment rule that would apply under the Uniform Prudent Management of Institutional Funds Act (UPMIFA) have been incorporated within this presentation.

# On Behalf of Our Board of Directors

The Mid-Atlantic United Methodist Foundation is governed by an independent and self appointing Board of Directors holding a diversity of views and opinions with regard to the future status of the United Methodist Church. Therefore this presentation is not an endorsement of any singular group or individual approach to the future of the United Methodist Church.

This presentation is intended to inform, educate, and inspire conversations for the proper care of church resources, donors, and donated assets as we develop a culture of Christian stewardship in every church, and encourage generosity toward all our Brothers and Sisters in Christ.



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# **“Denomination Blues”**

Recorded by Washington Phillips  
1927

# We Begin at the End...

## Sample Christian Preamble to a Will

In the name of the God Father, Son, and Holy Spirit. Amen. I want my loved ones to know that I place full confidence and trust in my Lord and Savior Jesus Christ, who promised: "I am the resurrection and the life; he who believes in Me shall never die." (John 11:25-26)

I leave to all of my loved ones the words of our Savior, found in **John 3:16**; "**For God so loved the world, that He gave His only begotten Son, that whoever believes in Him shall not perish but have eternal life.**"

I leave those who survive me the comfort of knowing that I have died in this faith and now have joined my Lord in eternal glory. I recognize that all of my earthly possessions are a gift from God. Therefore, I have made provisions in my will to continue my Christian stewardship after I have gone to Heaven to be with the Lord.

My heirs and my church will receive, through me, gifts from God. May you always remember that everything you have is a trust from God. Be good and wise stewards of His blessings, managing wisely and returning to Him a generous portion for the work in His Kingdom.

## Trust and Reputation in Managing Gifts

Warren Buffett famously said: We can afford to lose money, even lots of money.

But we can't afford to lose reputation, even a shred of reputation.



# Trust and Reputation in Managing Gifts

## Reasons Why Donors Give

1. Belief in the Mission
2. Regard for the Staff
3. Fiscal Responsibility
4. Impact

# Trust and Reputation in Managing Gifts

What is....

The UMC's Reputation

Your Church's Reputation

Your Pastor's Reputation

Your Leadership's Reputation

# Trust and Reputation in Managing Gifts

## Trust and Reputation

impacts all gifts entrusted to you

- Annual
- Capital
- Legacy

# Building Trust and Reputation in Managing Gifts

Trust = Transparency: How clear are your

Endowment Policies

Distribution Policies

Gift Acceptance Policies

Investment Policies

Cemetery Policies

Audit Policies

How frequently do you break them?

# Building Trust and Reputation in Managing Gifts

Gain my Trust = Gain my Gift

Plans for Gifts = My Planned Gift

A well articulated vision and well defined goal will not go unfunded. Over \$3 Billion Dollars Given in 2018.

We are no longer in an environment where donors give from obligation; we have shifted to donors seeking transformation.

# Building Trust and Reputation in Managing Gifts

What stories are you telling the congregation?

Lives are being transformed or we must survive until till tomorrow?

The Sun is Setting or the Sun is Rising?



# Before Gazing Into the Crystal Ball of the Future...



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# You Must Understand the Foundation of Your Past





Many Points of View...

- **The Bishop's**
- **The District Superintendent's**
- **The Pastor's**
- **Church Leadership's**
- **The Congregation's**
- **The Community's**

Points of View

**The most important to your funding...**

**Your Top 5- 10 Donor Families**

**Does the Pastor know who they are?**

**Or do they have to guess?**

Question to answer for a donor

**Not Why Give?  
But  
Why Give to You?**

Are You Validating a Donor's Fears or Addressing Them

**I won't give to a sinking ship**

**I won't spend my money on litigation**

**The Conference will take our assets**

**We shouldn't pay our apportionments**

Are You Validating a Donor's Fears or Addressing Them

**I won't support the greater church**

**I won't support uncertainty**

**I won't be sticking around**

**The Church is Ending**

**Acceptance that not everyone will be  
with the future church**

**Can free others to move forward  
to the future church**

# Is Your Church?

**God Centered**

**Mission Driven**

**Disciple Making**

**Lives Changing**

**Do People Sense a Purpose: Time, Talent, Treasure**

**Are People Encouraging, Comforting, and Supporting**

**Are They Kingdom Building**

## Forward Action Steps

**Communicate Facts not Rumor**

**Understand Laws and Obligations**

**Develop Transparent Policies**

**Create Small Group Discussions**

**Enhance Ways of Giving to Your Church**

**Consider the Foundation's Many Resources**



## Forward Action Steps

1. Strengthen the Belief in the Mission
2. Enhance the Regard for the Staff
3. Model Fiscal Responsibility
4. Share the Impact on Lives

# Become a Beacon to the Future



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# Questions and Answers

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800-828-9093 Ext 1008

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