

Mid-Atlantic

United Methodist



Foundation

Empowering Stewardship to Support Ministries.

Funding Ministry

Jack Brooks, Exec. Director, Mid-Atlantic Foundation

<https://midatlanticfoundation.org>

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

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Shifting From Paying Bills to Funding Ministry

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**Given the "Denomination Blues"
Can we do it?**

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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.

We Begin at the End...

Sample Christian Preamble to a Will

“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.

We Begin at the End...

Sample Christian Preamble to a Will

How did this Christian Disciple transform?

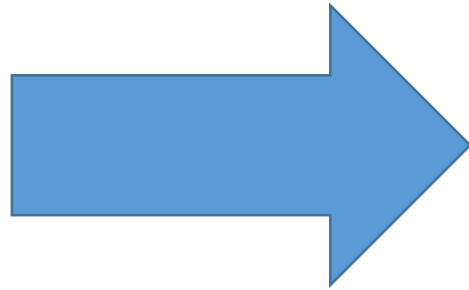
How will this gift transform the Church?

How will this gift transform a Ministry?

How will this gift transform another giver?

Moving Your Ministry Funding

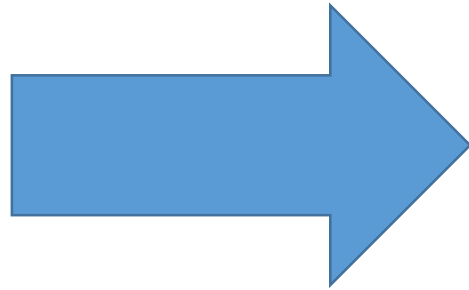
From paying bills



Funding Ministry

Moving Your Ministry Focus

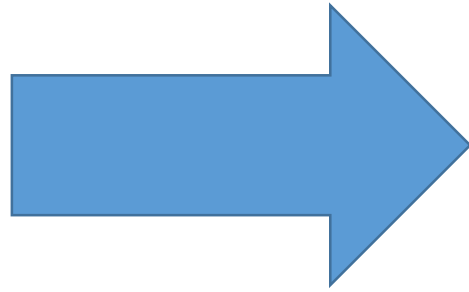
We Need to Pay Bills



We need to Fund Ministry

Moving Personal Focus

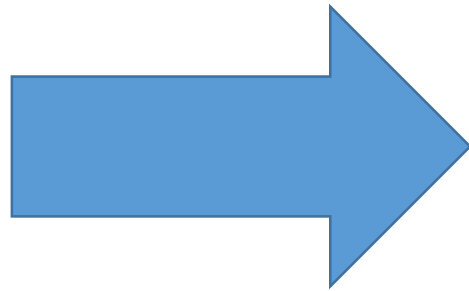
My Obligation



My Generosity

Changing Perceptions / **Creating** Trust

The Church Only Cares About Costs



The Church Only Cares About Impact

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 (A)
- Capital (C)
- Legacy (L)

Building Trust and Reputation in Managing Gifts

Trust = Transparency: How clear are your

Church Financial Needs Explained (A)

Budget Line Items (A)

Budget Narrative (A)

Capital Projects or Capital Campaign Described (C)

Goals for participation (A, C, & L)

Building Trust and Reputation in Managing Gifts

Trust = Transparency: How clear are your

Endowment Policies (L)

Distribution Policies (L)

Gift Acceptance Policies (L)

Investment Policies (L)

Cemetery Policies (L)

Building Trust and Reputation in Managing Gifts

Trust = Transparency: How clear are your
Audit Policies (A, C, & L)

With all your Financial Policies or Best Practices

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 and Information.

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 on us or the Sun is Rising for us?



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
Christ Focused
Mission Driven
Disciple Making
Lives Changing**

**Do People Sense a Purpose for: Time, Talent, Treasure
Are People Encouraging, Comforting, and Supporting Each Other
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

Planning for the Future

- Endowment Fund Program
- Capital and Operating Campaigns
- Easter and Christmas Eve Mission-Directed Offerings
- Financial Peace University

Planning for the Future

- Rental of space to community profits and non-profits
- Grocery cards
- Parking Lot rentals
- Antennas in steeples
- Event sponsorships
- Other?

Transforming Your Church's

1. Belief in the Mission
2. Regard for the Staff
3. Fiscal / Fiduciary Responsibility
4. The Impact on Lives

Become a Beacon to the Future



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Questions and Answers

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