



United Methodist
FOUNDATION
Of Indiana

Fueling the future of ministry
2016 Annual Report



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A letter from the President

God will see us through our journey.

With the conclusion of the Lilly Endowment grant supporting the Rejuvenate ministry, UMFI reevaluated the services we offer and how we could best support our local churches and the Conference. As a result, we have implemented several changes in our operations and structure. We fully believe these changes will make us more efficient and effective, but change is always challenging.

We realize these are also uncertain times in our denomination, our country and around the world. We have faith that God will see us through all the transformations we are experiencing and pray that each of you can enjoy the peace of knowing God is beside you. We look forward to nurturing the many new partnerships we have seen developing over the last year and hope we can be of service to you or your congregation.

Manet Shettle

Manet Shettle
President





UMFI volunteers at the Ronald McDonald House at Riley Children’s Hospital

UMFI board and staff are committed to serving within the Indiana Conference. Every year the staff selects one ministry to spend a day serving as they can. This year they chose the Ronald McDonald House at Riley Children’s Hospital preparing and serving lunch to the parents and siblings of children admitted to the hospital. While they were feeding family and friends of these children, they also spent time hearing their stories and listening to their concerns and joys.



“We pray these families and their young patients will feel the presence of God in their lives as they travel this road.”

UMFI STAFF & BOARD MEMBERS

UMFI distributed over \$1.22 million in grants to a variety of ministries in Indiana during 2016.

Many of these grants were selected by the donors, but several were selected by the committees of UMFI. There were many wonderful ministries supported by these grants.

HERE ARE A FEW OF THOSE STORIES:



“We could feel the power of all those that were loving and praying for us as we were on this journey.”

THE LANGDON FAMILY



The Langdon Family

Grace UMC in Hartford City was planning a mission trip to Jamaica to build three homes and the Langdon family wanted to participate.

Since for each this would be a first-time experience, they applied for a Mission Scholarship from the Foundation and were able to join fifteen others in ministry to the people of Jamaica and each other. The family shared an especially moving experience during the dedication of the homes. “We laid hands on the home in prayer just as our congregation at home laid hands on us before we left for the trip. We could feel the power of all those that were loving and praying for us as we were on this journey.”



First United Methodist Church

First United Methodist Church of Connorsville received a grant for outreach to their community through Vacation Bible School and a Block Party. Vacation Bible School was small, but enthusiastic. The Block Party reached 500 people in their community. Beyond the food and games, the Lion’s Club provided vision screening and police and fire fighters were present to show the kids the fire trucks and police cars. The church members provided books and toys for the children and distributed two-hundred New Testaments. Local musicians provided music during the day and stories of health and recovery were shared in a closing worship service.

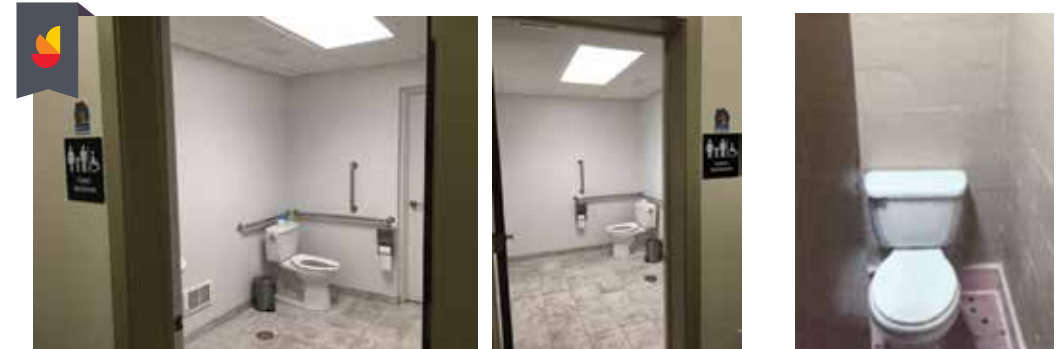


Trinity United Methodist Church

A church building can seem rather ordinary to those passing by. Trinity United Methodist Church in Hartford City received a grant to draw attention to their building and to their mission. Interior signage is helping visitors find their way around in the church. The bright exterior banners and signage draws attention to their entrance and shares the church's vision: Reviving Faith, Restoring Hope, Revealing Love.



"We are extremely thankful to you for awarding us the grant money to be able to purchase interior and exterior signage. We appreciate your investment in Trinity Church, our community, and most importantly, the Kingdom of God."
DUSTIN L. JONES, LEAD PASTOR



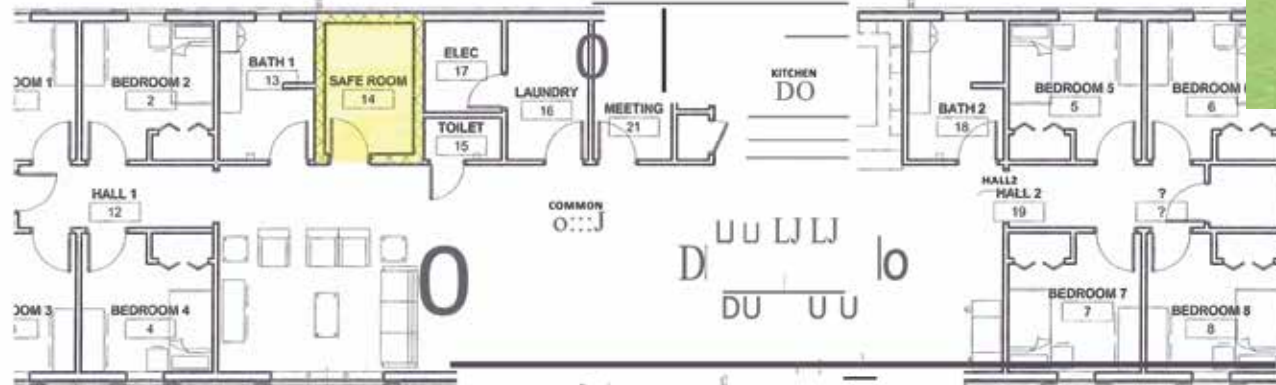
New bathrooms

Old bathroom

Ridge United Methodist Church

We don't usually offer the opportunity for bathroom jokes, but here it is. The reality is, not having an accessible bathroom is not funny to those who need one and limits those that can participate in the life of our churches. Ridge United Methodist Church in Munster faced that very problem. The bathroom facilities they had in the education wing of their building were built in 1959 and were much too small to be handicap accessible. They applied for a facility grant and with other donations were able to remodel these restrooms into one large family and handicap accessible room.

Computer rendering & blueprint of the new space



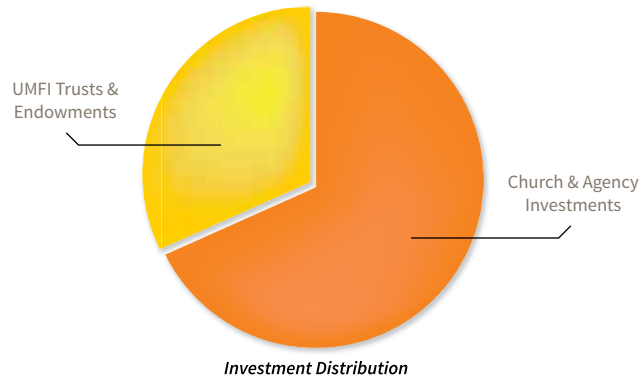
The United Methodist Youth Home in Evansville has impacted the lives of over 1,000 young people in their 30-year history.

The United Methodist Youth Home

The United Methodist Youth Home in Evansville received a grant to help fund the "safe room" in the new Boy's Group Home. This ministry is helping at-risk youth become responsible and productive citizens. The current facilities restrict the number of boys who can participate and limits the activities they can have in their home.

We manage investments on behalf of local churches and agencies.

Over 70% of the investments managed by UMFI are actually funds of our local churches and agencies. We provide access to socially-screened funds that otherwise would not be available to our local churches. The funds are market based funds and provide returns that are competitive with non-screened funds of a similar nature. Good returns are only half of the equation in evaluating investment options. The risk of the investment should also be of critical concern. The funds offered through UMFI are usually slightly lower risk than the peers in their group.

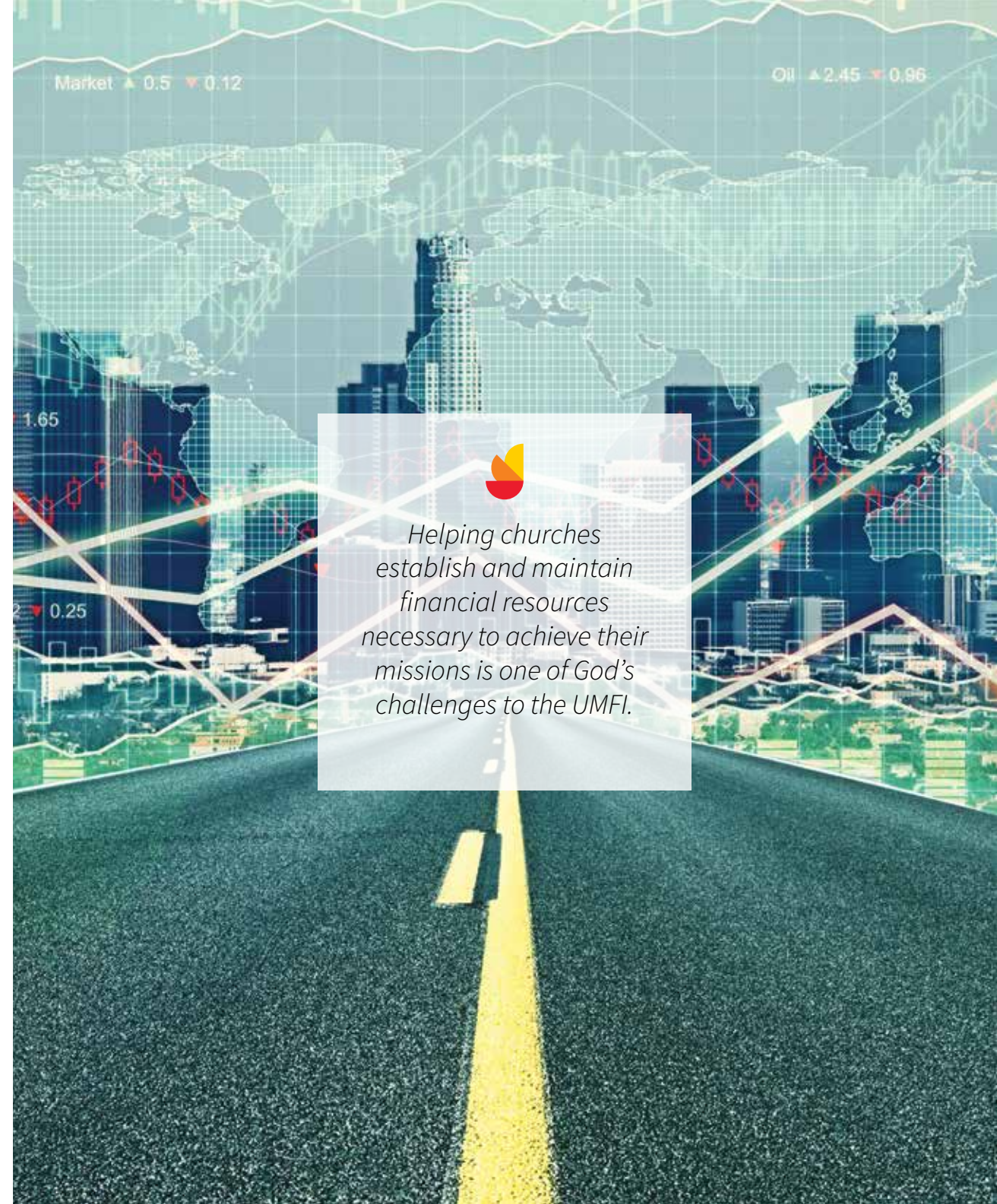


Money Market – \$ 5,911,700
 Fixed Income – \$2,559,195*
 World Allocation – \$6,891,805

Short Term – \$115,088*
 Multiple Asset - \$46,088,506*
 Global Equity - \$4,385,261*

UMFI assists local congregations in developing investment protocols that address their unique needs and risk tolerance. Endowment funds are regulated by the Uniform Prudent Management of Institutional Funds Act, which sets standards for investing endowment funds. UMFI assists local congregations in understanding and maintaining compliance with these regulations.

**Funds screened to be in compliance with the Social Principles of the United Methodist Church*




Helping churches establish and maintain financial resources necessary to achieve their missions is one of God's challenges to the UMFI.



Rev. Jean Ness

The Lydia Scholarship is established by Rev. Jean Ness

God’s call to ordained ministry doesn’t always happen early in one’s life. Sometimes that call is heard in mid-life when the demands of family and other commitments make it more difficult to say yes.

Rev. Jean Ness answered God’s call to ordained ministry at a time when she and her husband were raising three elementary aged children. Her family responsibilities didn’t allow her to take a full-time course load in seminary which made her ineligible for scholarships from the seminary and The United Methodist Church. She was fortunate that she had resources to pay for seminary. But as she notes, “Others may not be so fortunate.”

Jean has given a gift to establish the Lydia Scholarship for second career women answering a call to ordained ministry. Unlike most scholarships, the Lydia Scholarship will be given to women who are part-time students. The scholarship is named for Lydia in the Book of Acts. Her gifts of hospitality, service and resources are a model for generosity. UMFI is grateful to Jean for her generosity in helping educate new leadership in our annual conference.

Statement of Financial Position

	As of 12/31/2016	As of 12/31/2015
Investments	\$ 67,523,431	\$ 60,713,509
Assets	242,707	413,190
Total Assets	\$ 67,766,138	\$ 61,126,699
Participant’s Investments	\$ 48,238,826	\$ 41,785,005
Trusts & Annuities	1,985,953	2,087,143
Other Liabilities	229,213	393,470
Total Liabilities	\$ 50,453,992	\$ 44,265,618
Unrestricted Net Assets	\$ 2,550,168	\$ 2,756,413
Temporarily Restricted	4,452,250	3,970,704
Permanently Restricted	10,309,728	10,133,964
Total Net Assets	\$ 17,312,146	\$ 16,861,081
Total Liabilities & Net Assets	\$ 67,766,138	\$ 61,126,699

Statement of Activities

	As of 12/31/2016	As of 12/31/2015
Management Fees	\$ 885,968	\$ 864,760
Contributions	427,679	1,167,154
Investment Income	1,555,259	(463,941)
Change in value of Annuity, trusts	98,755	458,774
Total Income	\$ 2,967,661	\$ 2,026,747
Grants and other program expenses	\$ 1,541,092	\$ 3,882,280
Personnel	603,340	647,425
Administration	372,164	570,861
Total Expense	\$ 2,516,596	\$ 5,100,566
Change in Net Assets	\$ 451,065	\$ (3,073,819)

Footnotes, which provided significant information concerning the financial condition of the United Methodist Foundation, have not been included. For a copy of the complete report of the audited financial statements please contact UMFI.

2016

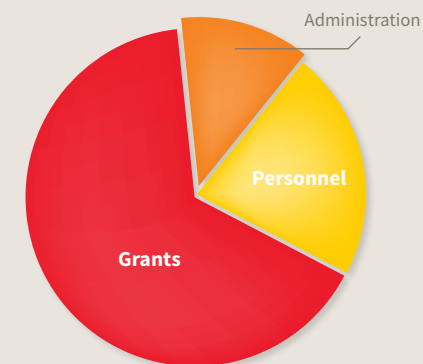
OFFICE STAFF

- SUE CUNNINGHAM
- TAMMY FOSTER
- TAMYE HENDRICKS
- CHRIS JACOBS
- MARY ANN MOMAN
- BRIAN PHILLIPS
- MANET SHETTLE
- SUSAN STACH

FIELD STAFF

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- LARRY BUSH
- MARLA DERNAY
- VERN DEUTSCH
- BECKY KAMMEYER
- TODD OUTCALT
- PAUL PERRY
- DAVID REES

2016 Expense Distribution





Stewardship Mentoring Program

UMFI is dedicated to encouraging the growth of strong stewardship, in all its forms, within the congregations of our Conference. We partner with local congregations as they develop their charter and appropriate policies to create a planned giving ministry focused around an endowment fund. We meet with strategic groups as they develop those documents or when they revisit them, to give them support and to share ideas that have worked well in other churches in our Conference.

One of the most exciting new educational opportunities offered by UMFI is the Stewardship Mentoring program. This program looks at five specific areas and the impact these areas have on the members of the congregation. It also provides a tool for the church to assess their needs in each area. The focus of this process is helping churches tell their story to connect their members to ministry within their congregations. The basic concept of this stewardship education program comes from a deep-seated gratitude for the many blessings God has given and our desire to respond to the call God places on each of us to be fully engaged in His ministry.

UMFI also provides seminars and workshops at the local church for their congregations and community to develop a better understanding of how donors can create a legacy with their church.

Committee Structure

^b Member of the Board of Directors

^{*} Chair of the committee or task group

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WES ZIRKLE, Vice Chair ^b
MITCH NORWOOD, Immediate Past Chair ^b
MANET SHETTLE, President ^b
JAN PASSMORE, Secretary ^b
SHELLEY JOHNSON, Treasurer, Finance & Operations Chair ^b
JOHN CLAY, Chair of Investment Committee ^b
BISHOP TRIMBLE, the Bishop or designee ^b
JIM GENTRY, Ministry Outreach Chair ^b
DEVON YOHO, Loan & Savings Ministry Chair ^b
KARLA ELLIOTT, Loan & Savings Ministry Vice Chair ^b

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FORREST BOWERS ^b **DEVON YOHO** ^b
MONTE CHAMBERLIN ^b **WES ZIRKLE** ^b

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FORREST BOWERS ^b **MITCH NORWOOD** ^b

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JACK BURKS **ROYCE RUCKMAN**
TOM HECK ^b **GEORGE WILD**

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ED ARMANTROUT **GREG MCGARVEY**
DIXIE ARTER ^b **KATHY MITCHELL**
TERI CROUSE ^b **IN SUK PEBBLES**
JACKIE CHANDLER **NANCY RAIDY** ^b
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IAN HALL **BRIAN WILLIAMS**
SHALIMAR HOLDERLY **CRAIG WOOD** ^b
CANDICE LANDRY **DOUG WALKER**

2016 DONORS

Donations made by past and present supporters funds Foundation grants to Indiana ministries. In many instances, these donations create trusts or endowments that generate funds for future ministries.

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 ATHENS MT. HOPE CEMETERY
 MR. & MRS. JOHN CLAY
 THE COMPASS UMC
 REV. & MRS. MARK DICKEN
 REV. JACK DIEL
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The United Methodist Foundation is committed to supporting and resourcing United Methodist churches to make disciples for Christ for the transformation of the world. We share our expertise in the financial arena with churches and their members to improve the financial strength of Indiana United Methodist churches and provide transformational leadership.