



Kansas Area
United Methodist
FOUNDATION

Leaving a Legacy in Times of Change

2020 Annual Report



Our Vision

The Foundation seeks to be the trusted resource for all things financial for churches and charitable giving. The Foundation's vision is to help individuals give generously and to leave a lasting legacy to provide enduring support for their church and other ministries they care about. The Foundation seeks to help churches be financially healthy and to have the resources to do the ministries God calls them to do. Finally, the Foundation seeks to be a reliable investment partner for churches, institutions, and agencies who are United Methodist or connected to the Methodist movement.

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Message from Our President



Grace and Peace to you in the name of Jesus Christ, the Light of the World.

I want to begin by expressing my great appreciation for the many ministry partners with whom we connect and serve, especially throughout this challenging year. You are the ones who are serving and making a difference in our communities across Kansas. Thank you for your faithfulness and dedication. It is our honor to offer financial support to you and to partner with you as you fulfill the mission of the Church. As one faithful Board member and donor stated, "the Foundation only succeeds when our partner churches, agencies, and institutions succeed."

The year 2020 was one where most of us were required to adapt, learn new things, and refocus our purpose, even if in new ways or modes. The Foundation has done likewise, so that we can fulfill our ministry with you. One such adaptation was in our trainings and materials for families and churches. We moved many of the normal in-person trainings to online versions that are accessible on-demand for churches and families. I am proud of the collection of resources we have developed and the plans for additional future programing.

One special program we have created is a new monthly Learn & Grow seminar, facilitating experts in the field to help families, churches, and agencies with many different aspects of financial wellness. It is my vision that we will continue to grow this program so that we become the trusted resource for all things financial. We seek to be a hub of resources and connections, knowing that through partnerships with others, we can serve our constituencies well.

Finally, we have grown in our desire to be proactive in helping people of faith give to make a lasting difference for generations to come. I ask you and your family to consider prayerfully what legacy you will leave. We are blessed to be a blessing and to use what has been entrusted to us to further the work and ministry of the church, in honor and devotion to the Lord. We would be honored to help serve you in your generosity, all to the Glory of God. Thank you for your generosity.

Rev. Dr. Dustin D. Petz
President and CEO

2020 Board of Trustees

Bill Riley, Manhattan, KS, Chair

Rev. Gary Beach, Manhattan, KS, Vice Chair

Keith Geist, Hutchinson, KS, Secretary

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Rev. Andrew Conard, Topeka, KS

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Sue Dondlinger, Wichita, KS

Duane Dunn, Wamego, KS

Daniel Eilert, Wichita, KS

Janice Frahm, Colby, KS

Sandra Holt, Overland Park, KS

Richard Martin, Topeka, KS

Rev. Jo Mead, Wichita, KS

Melinda Parks, Lenexa, KS

Mark Queen, Manhattan, KS

Steve Schulte, Overland Park, KS

Bob Timmons, Fredonia, KS

Shawn Wyatt, Hutchinson, KS

Bishop Rueben Saenz, Jr.

Message from Our Board Chair



During the past year I have enjoyed the unique opportunity of chairing the KAUMF Board of dedicated volunteers with the KAUMF staff led by our President, Dustin Petz. This has been a powerful reminder of the important service the Foundation has provided the Great Plains conference of the United Methodist Church. Certainly, 2020 has not been the year we anticipated as we ended 2019. For the Foundation, the positive opportunity from the pandemic disruption has been to reflect on how the Foundation can prepare for an even greater role in the future of churches, institutions, agencies, and organizations who are United Methodist or connected to the Methodist movement.

The Foundation's history of investment management and construction loans to churches provides a platform for expanding the future services of the Foundation. To ensure the continuing value of those two roles, significant changes to the investment management program and the loan program have been implemented by the Foundation resulting in higher fiduciary standards and operational security.

In anticipating the post-pandemic world, the Foundation has revised its Board and committee structure to focus on expanding our role with new programs, responding to future financial challenges throughout the conference.

No doubt all of us share uncertainties in anticipating life following 2020. It seems clear life in the United Methodist Church will be challenged in many ways. Change for individuals and organizations is often challenging, and the Foundation is committed to its mission of support of the United Methodist vision even as it may take a different path for the future.

Bill Riley
2020 Board Chair

2020 Praises and Highlights

Despite the difficulties the year brought, God is still at work in our churches, communities, and across our state and globe! We give thanks that in the past year the Kansas Area United Methodist Foundation gave over **\$2.7 million to support local churches, church-related agencies and organizations, and other charitable causes.** Together, the generosity of so many is making a difference!

This year brought a few "firsts" for the Foundation. For the first time, the Foundation offered trainings and seminars solely via an online platform. Through the use of technology, the Foundation **offered two Leaving a Lasting Legacy Workshops** and **began the Learn & Grow Seminar Series** that focuses on various educational topics for clergy and laity. The Foundation also encouraged individuals and families to make a lasting difference on Giving Tuesday and give to an endowment fund for their church or other organization. Through your generosity, **more than \$14,400 was given to make a lasting difference on Giving Tuesday!**

During the year, **nine families worked on their estate plan with an attorney** who works with the Foundation. Through the planning process, the families were able to ensure their loved ones would be provided for and their charitable wishes would be honored. Thank you to these families and others who completed the estate planning process in 2020!

The generosity of many partners allowed the Foundation to make a difference through giving **17 Pathways for Discipleship Grants** to help start new ministries and make disciples of Jesus Christ. Thank you to all the families who have given, now and in your estate, to make these grants possible.

The Foundation is honored to support the next generation of Great Plains Conference clergy by providing seminary scholarships through the KAUMF Seminary Scholarship Fund and the Pass the Torch scholarship. In 2020, the Foundation gave **more than \$17,000 in seminary scholarships.** Thank you for investing in the next generation of clergy leaders!

In 2020, the Foundation staff worked with many churches and families to create a lasting legacy in Kansas through their estate plans, endowment ministries, and other resources. **Thank you to the families, churches, institutions, and agencies who partnered with the Foundation in 2020!** We are honored to serve 32 new accounts in 2020.

The Foundation is grateful for the dedication and leadership of the Board of Trustees. At the end of 2020, **Bill Riley** and **Dan Eilert** completed their terms on the Foundation's Board. Thank you Bill and Dan for your commitment and service, helping to lead the Foundation for many years.



Bill and Erma Riley



Dan and Tammy Eilert

Building an Endowment for Future Ministry

First United Methodist Church of Emporia had a long-standing endowment program in place, but the church leadership knew it needed to be streamlined and refocused.

“The big picture is stewardship,” Ed Bashaw, Chair of the Permanent Endowment Committee said. “We are supposed to be good stewards of what we have and our goal is to create disciples for Christ. We saw some inefficiencies both from the operational side and promotional side.”

The church knew the positive impact of having an endowment ministry as generous gifts given to the endowment in the past made many ministries possible, including allowing the children and youth ministry leaders to attend a recent conference. This conference was a valuable tool for the leaders to continue learning and finding resources for Sunday School and Vacation Bible School. By attending prior to the pandemic, the leaders had creative ideas to help the ministry continue through COVID-19.

Leaders from Emporia First attended the Leaving a Lasting Legacy workshop presented by Rev. Dr. Dustin Petz, President of the Kansas Area United Methodist Foundation. As a result, they saw the potential for the church’s endowment ministry and how the Foundation could help them make it happen.

“Rev. Petz was very gracious to offer his services as we began looking at updating our charter and forming a Permanent Endowment Committee,” Rev. Karla Sheffy, Co-Pastor at Emporia First UMC said.

The church worked through an example charter, provided by the Foundation, which included disciplinary guidelines and issues to have included in their working document. During this process, it became clear that the endowment program needed to be simplified and have direction from one standing committee.

“The one committee really has knowledge of a lot of things and are able to make the directives for the cash flow a little bit better with that knowledge,” Ed said.

In addition to streamlining the committee, the leaders also worked to form a vision and refocus the giving areas to improve communication. Many of the funds that the church previously established were combined to create an unrestricted Legacy Fund, with two other targeted ministry funds, the Ministry Impact Fund and the Property Fund.

The updated charter was then adopted by the congregation and the church is excited for the future of growing their endowment ministry to strengthen and impact their ministry. The leaders at Emporia First are grateful to Rev. Dr. Dustin Petz for his work in helping to update the program.

“Everything we do is for the future,” Rev. Karla Sheffy said. “Our Christian faith is no different. To keep Christ’s life-giving love in focus is important and the endowment program is a resource for building the future of faithful Christians.”



“The big picture is stewardship. We are supposed to be good stewards of what we have and our goal is to create disciples for Christ.”

~ Ed Bashaw



“Everything we do is for the future. Our Christian faith is no different.”

~ Rev. Karla Sheffy



FREE ESTATE PLANNING SERVICES

John Griffin, Esq.
Stewardship Counseling, LLC

The Kansas Area United Methodist Foundation partners with John Griffin, Esq. of Stewardship Counseling, LLC to provide FREE Estate Planning services. The draft plan may then be given to your attorney to formalize. This service offers you a comprehensive guidance in planning your estate so that it may minimize income, gift, estate and inheritance taxes and facilitate smooth business, farm and asset transitions. This is a service that is scheduled ONLY by appointment.

Please contact the Kansas Area United Methodist Foundation for more information at 888.453.8405, foundation@kaumf.org, or www.kaumf.org



Protecting Family through an Estate Plan

While planning for a trip, Revs. Andrew and Nicole Conard discovered the opportunity to work with John Griffin, through the complementary service provided by the Foundation, and it provided the motivation needed to make their estate plan a reality.

“We were making plans for both of us to go on a trip while our children stayed with family,” Nicole said. “We wanted to be sure that we had a plan in place to care for our children were something unfortunate to happen to us.”

Although the pandemic changed their travel plans, it did not alter their desire to ensure they had a plan to take care of their children. Andrew and Nicole began meeting with John Griffin, an attorney with Stewardship Counseling, LLC, and through a series of meetings developed their estate plan.

“We had a wonderful experience working with John,” Andrew said. “He was thoughtful, thorough, and walked us through the details of decisions that we needed to make. His affable manner helped us work through important and serious conversations with one another and our family.”

With John’s guidance and legal expertise, the Conard’s were confident they were making the right decisions for their family. In addition, Andrew and Nicole were also confident about the legacy they will leave behind.

“We want to use our estate plan to care for our family,” Nicole said. “We also hope that we are able to be a blessing to others. Leaving a legacy is important for us as people of faith.”

Andrew and Nicole believe who they are today was shaped by the legacy of those who came before them. They were both recipients of scholarships and support for their education and have also been shaped by the spiritual influence of many people.

“We plan to leave a gift to the Foundation in our estate because we trust the organization’s ability to deploy funds for maximum effect in the mission field where we serve,” Andrew said. “The Foundation is able to provide ongoing stewardship for our gift in a way that ensures continued impact for generations to come. As our family is cared for in appropriate ways, we want to give a tithe or beyond to continue to be about God’s work.”

Through their estate plan, the Conards know their children will be provided for. Through their generosity now and in their estate, they will leave a legacy in the denomination they served through their permanent endowed family fund with the Foundation.

“If you don’t have an estate plan, you should probably get one,” Nicole said. “We do not have a large estate, however we want to care for our children.”

Grant Helps Camp's Ministry Adapt

When Camp Lakeside applied for a Pathways for Discipleship grant from the Kansas Area United Methodist Foundation, they had no idea that the 2020 summer camping season would quickly come to a halt due to COVID-19.

After the Great Plains Camps suspended the summer's traditional camping programs, Ross Janovec, Camp Lakeside Director, Katie Laing, Camp Lakeside Program Director, and the site council brainstormed ways camp programs could still continue, even if not in the traditional way.

"We knew our campers likely had been pursuing online schooling and communication with friends, so we wanted them to experience 'camp' at home and off-screen," Ross said. "Camp in a Box was a way for our campers to experience camp at home while providing activities and devotional materials that weren't technology oriented."

Camp Lakeside's Camp in a Box included a variety of materials to serve the campers experience while at home with their family. The box included everything from a devotional book, crafts, a worship playlist, an exclusive "Lakeside Canoeing Lizard" sticker, and more.

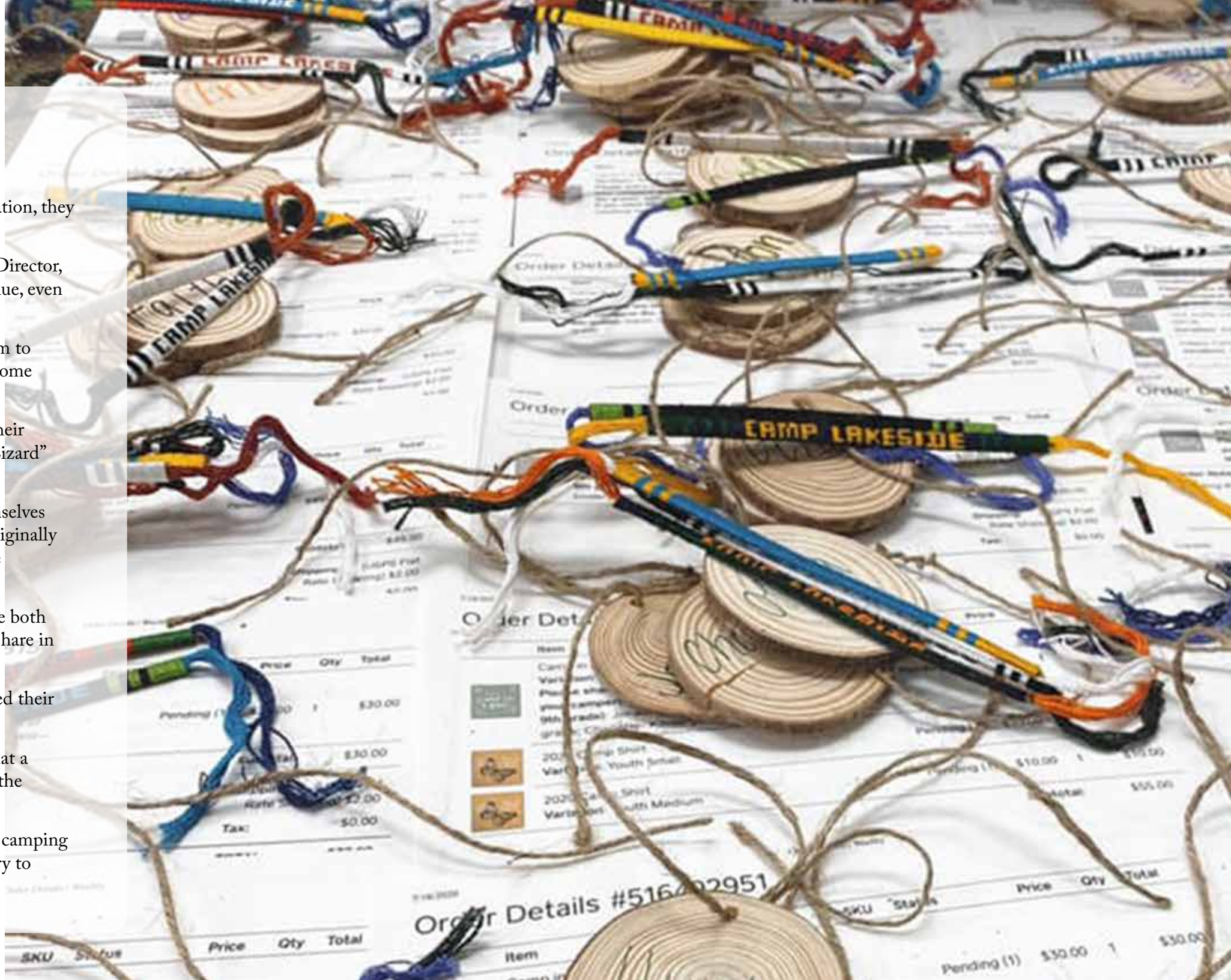
The response from campers and their families was extremely positive and the Camp Lakeside staff quickly found themselves in need of help. The site council reached out to the Foundation for approval to change their grant from supporting the originally planned summer events to supporting the Camp in a Box efforts. With the support of the grant, Camp Lakeside had the additional resources it needed to partner with other Great Plains camps for staffing.

"Camp Fontanelle and Camp Chippewa graciously and excitedly sent 15 of their summer counselors to assist Lakeside both with packing Camp in a Boxes, and also to work on other maintenance projects on-site," Ross said. "It was a blessing to share in fellowship, community and laughter with our sister camps for a weekend."

Through the creativity of Camp in a Box and the partnership with their sister camps, the staff at Camp Lakeside helped their campers experience camp in a new, creative way, despite the COVID-19 pandemic.

"We have heard stories that a 9-year-old boy brought the nature scavenger hunt to do on a Boy Scout camping trip, that a 15-year-old female camper decided to work through the devotional book with her friends from school — and of course, the stuffed animals from the Camp Store were extremely popular with our youngest campers," Ross said.

The Foundation was honored to continue partnering with Camp Lakeside in what turned out to be an unprecedented camping season. The Foundation is thankful for its many faithful donors who give to the Pathways for Discipleship Grant Ministry to allow ministries, like Camp Lakeside, to have new visions for what ministry can be.



The Foundation is grateful for the many donors who make the KAUMF Seminary Scholarship possible!

2020-21 Recipients

Ally Drummond
Robert Fillmore
Julie Freeman
Wesley Gately
Brenda Hogan
Joshua Johnson
Shayla Jordan
Changhyun Kim
Charles Kitua
Chris Lehew
Caitlin Ott
Matt Ozment
Maria Penrod
Victor Peterson
Abraham Ruffcorn
Valecia Vogts-Scribner
Lacey Wheeler
Grace Woods
John “Wesley” Young



Ally Drummond

KAUMF Scholarship Recipient

What inspired you to go into ministry?

As most call stories go, it seems that there were a lot of small breadcrumbs that help guide me into answering a call to ministry. Though, there are surely some parts of my story which stand out as being the most inspirational and formative to my call. After my grandfather died while I was in high school, I decided to volunteer at the local hospice house where he spent his final days of life. This experience both enlivened within me a deeper curiosity of care and compassion for others, as well as prepared me for an internship role at my local church within the Congregational Care ministries. It was within this internship which I recognized a passion for pastoral care. Though, it was not until I realized my other passion, social justice, definitely has a place within a call to ministry as well that I began to consider ministry more seriously. Between the internship at my local church and then an internship with Micah Corps through the Great Plains Conference, I have been inspired to carry all of my passions with me in answering a call to ministry. Because of the faithfulness of others in displaying ministry in all its forms to me, I am extremely excited to continue to pursue a call to ordained ministry.

What impact has receiving the KAUMF Seminary Scholarship made?

I am incredibly grateful for KAUMF and the dedication to supporting those who are called into ministry. Through your generosity, I am continually thankful for the ability to focus on my studies knowing I have the support of the United Methodists from back home. By receiving a Seminary Scholarship from KAUMF, I am able to be more fully present in my coursework while also making room for continual discernment and spiritual growth in my own faith life, without the additional worries about how I will cover the financial burden which higher education often requires. Both the spiritual and financial support offered through the KAUMF Seminary Scholarship has made my seminary experience a true joy.

How has your seminary education helped you in your ministry?

One of the best parts about my seminary education is the thoughtful mix of both practical theological study along with more theoretical and academic study of theological issues as well. This balance offers many ways of implementing my studies within my current ministry setting. This is true whether I am teaching a small group or Sunday morning Bible study class on topics which concern biblical and spiritual foundations of our faith, or considering ways in which I can best be in ministry with those the church is in partnership with in the community. Particularly as someone who did not take any theology or ministry classes in college, as some of my peers may have, I am so grateful to be receiving an education which plays a direct role in my current ministry setting and those that will come.

2020 Financial Report

**Funds Under Management
as of December 31, 2020:**
\$60,707,757

Permanent Endowment Funds
\$19,652,489

Split-Interest Trust Funds
\$5,020,989

Charitable Gift Annuities
\$1,642,103

Donor Advised Funds
\$1,887,591

Managed Funds
\$25,749,263

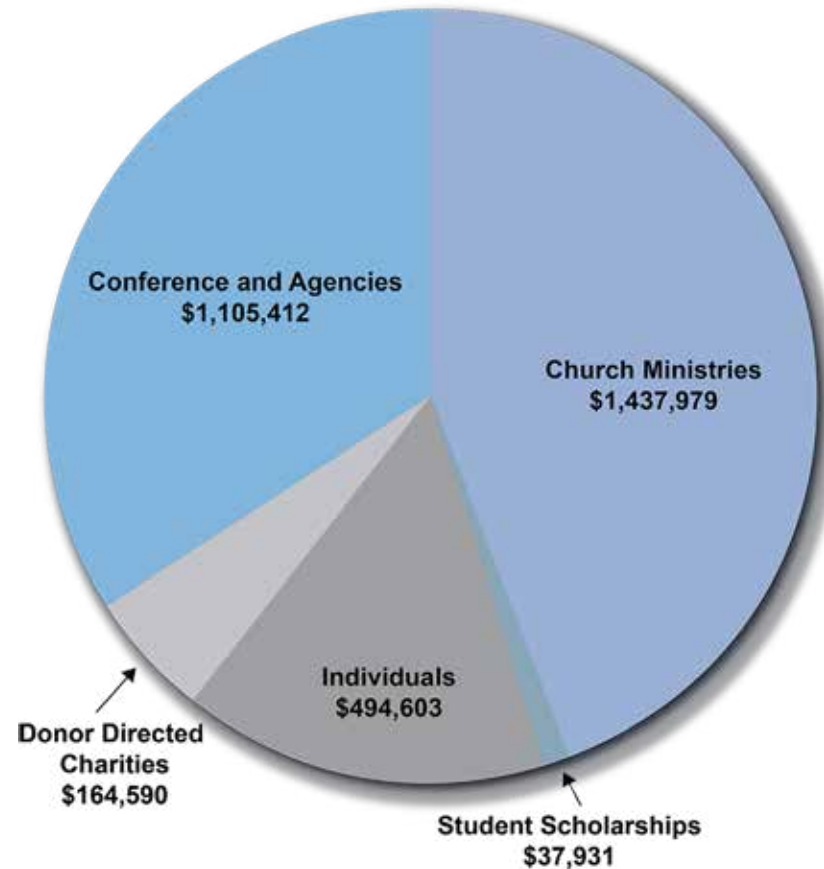
Church Development Loan Fund
\$4,971,407

KAUMF Endowment
\$1,783,916

2020 Investment Returns
Net-of-Investment Fees

Balanced Fund.....19.45%
Equity Fund.....24.70%
Fixed Income Fund.....8.24%
Short Term Fund.....1.68%

Distributions in 2020 totaled:
\$3,240,517



Individuals - Charitable Gift Annuities and Charitable Remainder Unitrusts are a popular way to provide life-time income and leave a legacy. Individuals can also invest in a Certificate of Participation.

Donor Directed Charities: Through a Permanent Endowed Fund and a Donor Advised Fund, individuals and families can support causes and ministries that are important to them beyond the church connection.

Church Ministries:

Through investment funds, the Foundation supports a wide range of ministries across the state of Kansas. From children's programs to missions trips to renovations, we help churches leave a lasting legacy in their community.

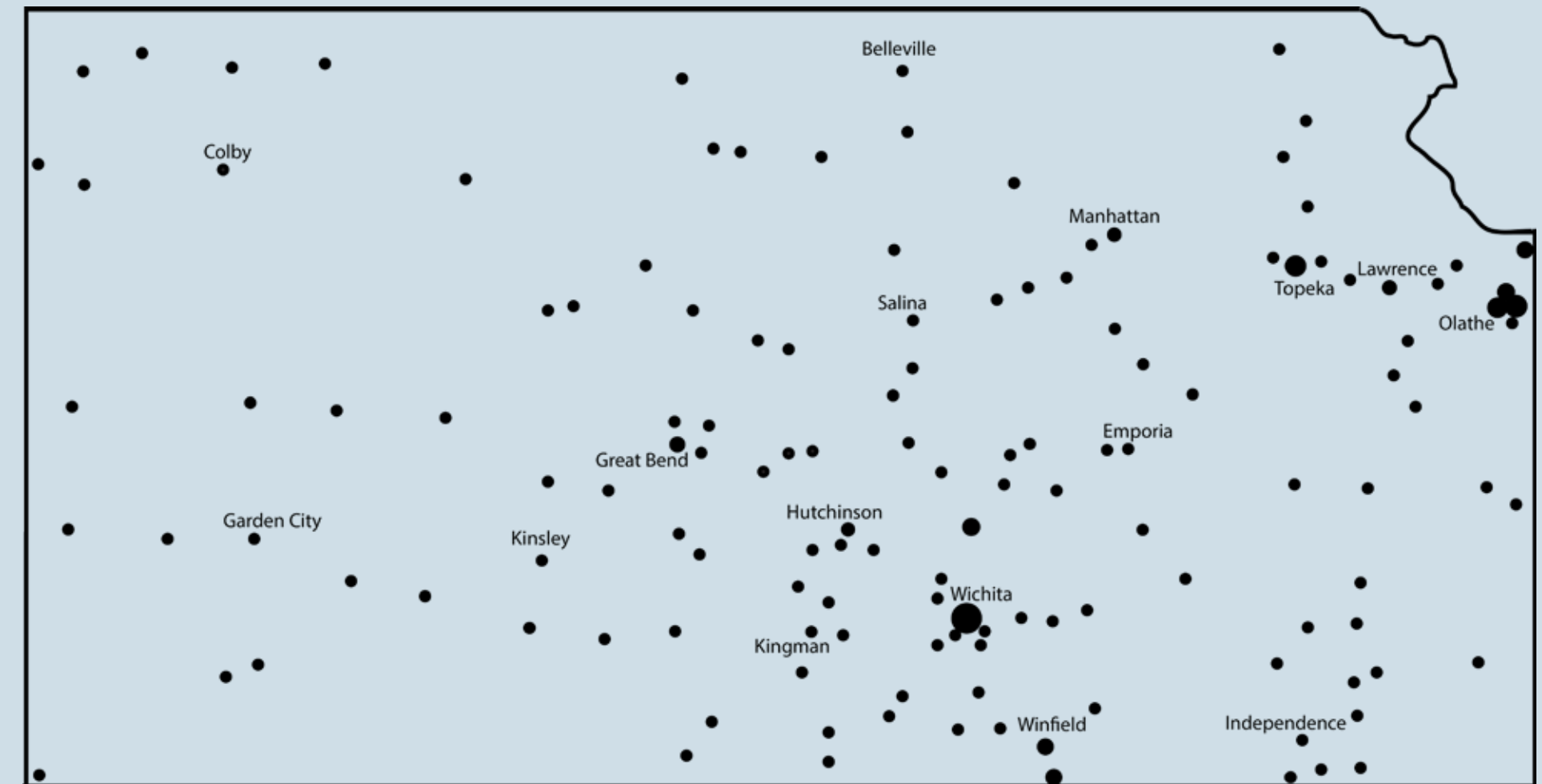
Student Scholarships:

In caring for scholarship funds and distributing Foundation scholarships, we invest in the future leaders of the church.

Conference and Agencies:

In supporting the Great Plains Conference and its related institutions, colleges and universities, seminaries, retirement homes, health organizations, camps, campus ministries, and social justice agencies, the Foundation partners in the work God is doing across the state.

We are Grateful for the Churches, Institutions, and Agencies who Partner with the Foundation's Investment Ministry!





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Foundation Staff



Rev. Dr. Dustin Petz
President and CEO



Dr. Sarah Diamond
Director of Legacy Giving



Gloria Markus
Director of Finance



Joanna Trapp
Communications Associate