



Faith & Funding

Missouri United Methodist Foundation

Spring 2016

CENTRAL METHODIST LEADERSHIP INSTITUTE SHARES WISDOM & EXPERIENCE



“Great delivery... the topics presented were spot on, very glad I attended my first Leadership Institute!” was one of many enthusiastic comments from those attending the 9th Annual Leadership Institute, April 21st at Central Methodist University.

Nationally recognized consultant, author, speaker, church leader, and businessman, Mike Bonem, was the featured speaker for a presentation titled “Navigating Healthy Change.”

Bonem admires some of the literature analyzing business leadership, but strives to translate that to the church context. As Bonem states, “My personal mission is to help leaders pursue great AND godly leadership and help their organizations achieve their God-given potential.”

“Mike has a truly extraordinary background and skill set” states Missouri United Methodist Foundation Executive Director, David Atkins, “and he couples that with a genuine understanding of the work-a-day world of pastoral ministry.” The Foundation sponsored the event.

Bonem spent over 10 years on the staff of West University Baptist Church in Houston, most recently as Executive Pastor. His business endeavors have included consulting as a Senior Manager with McKinsey & Company, one of the world’s leading management consulting firms, and senior leadership roles in two environmental service companies. Mike obtained his M.B.A. degree, with distinction, from Harvard Business School, after having obtained a B.S. degree in chemical engineering from Rice University.

One of the other highlights of the day was a live panel discussion with Pastor Allen Zugelter of Liberty UMC and Executive Director of Ministries, Sabra Englebrecht of The Gathering in St. Louis. Bonem led the discussion, and Zugelter and Englebrecht provided candid insights about how they encountered, encouraged or dealt with change in their ministry contexts.

Continued on page 4



Contributions & Tributes

The contributions, tributes, honors and memorials on pages 2 and 3 were received April 1, 2015 through April 25, 2016.
Please notify us of any corrections or omissions at 800-332-8238.

Zack F. and Kathryn L. Bettis Endowment

-benefits Manchester UMC Circle of Concern
Zack F. Bettis, Jr. and Karen Bettis

Edna M. Burch Memorial Fund

-benefits Rocheport UMC
William Cronan

Cappello "For Elise & Sam" Charitable Fund

-benefits Children's Ministries
Deborah A. Letchworth
-In memory of Sam and Elise Cappello

Cuba UMC General Endowment Fund

Anonymous

Cuba UMC General Scholarship Endowment Fund

Anonymous

The DeShon Family Endowment Fund

-benefits Huffman Memorial UMC
Larry and Linda DeShon

The Lonie and Joan Hank Charitable Fund

-benefits Liberty UMC
Lonie C. Hank

Betty Kishpaugh Memorial Fund

-benefits grants to local churches
Harry and Beverly Kishpaugh

William L. and Helen J. Krause Memorial Fund

-benefits the MO Annual Conference
William L. and Helen J. Krause Estate

Eugene L. & Sarah G. Lowry Charitable Donor Advised Fund

Eugene L. & Sarah G. Lowry

Keith and Barbara Maxwell Charitable Memorial Trust

-benefits Missouri United Methodist Foundation
Barbara Maxwell

The John & Miriam McClure Charitable Memorial Trust

-benefits Community UMC
John McClure Estate

The John & Shirley McClure Youth Ministry Memorial Fund

-benefits Mexico UMC
John McClure Estate

Miriam McCormick McClure Memorial UMW Scholarship Trust

-benefits Community UMC United Methodist Women
John McClure Estate

The Missouri Asbury Alumni Association Scholarship Fund

-benefits Asbury Theological Seminary
Missouri Asbury Alumni Association
Brad and Raven Reed

James C. Mordy Charitable Donor Advised Fund

James and Marjory Mordy

E.A. Morgan Family Endowment Fund

Elizabeth Ann Morgan
-In memory of Sandra Lee Bolick

MO Annual Conference - Fund for Area Development

Anonymous

MO Annual Conference- Hubert Bicknell Walker Memorial Fund

Dr. A.O. Smith, Jr. and Nancy Smith

MUMF Lilly Foundation Endowment Grant

Bill and Virginia Darr

MUMF Seminary Scholars Fund

-In honor of Warren Meyer's 20 years of service
to the Foundation
MUMF Board of Directors



The Missouri United Methodist Foundation lost a dear friend, valued colleague, and tireless ambassador, Warren J. Meyer, on March 11, 2016. Warren developed friendships, gifts and goodwill across Missouri on behalf of the Foundation for more than 21 years.

In memory of Warren J. Meyer:

- | | |
|-----------------------------|-------------------------------|
| Kent and Sharon Addison | William and Pam Moench |
| David and Emilie Atkins | Faye Pavelka |
| Cynthia Hewett Baker | Wendy and Wesley Poole |
| Catherine Cloyd | Robert and Donna Puyear |
| Groves and Carol Cooke | Douglas and Linda Ritterskamp |
| Robert and Rebecca Courtney | Bob and Beverly Rowlinson |
| Jim and Nancy Dunlap | Bert and Sue Sanders |
| Eugene Field Questers | Mary Jo Schieber |
| Marolyn Fehr | Deborah Seidel |
| Scott and Andrea Fehr | Bernadine Shafer |
| Reverend Byron Gilbreath | Greg and Karen Shafer |
| Jim and Carolyn Harding | Pete and Connie Soens |
| Dan and Linda HeiRonimus | Dorothy Spitzer |
| Betty Hunter | Karl and Flora Spuhl |
| Robert and Beatrice Huskey | Cleo Steffens |
| Emily LaBarge | Joy Sulzer |
| Robert and Lisa McLaughlin | TDK Technologies |
| Myron and Monett Lite | Richard Vreeland |
| Rich and Margaret Luze | Scott Walker |
| Audrey Lytle | Richard and Catherine Wieder |
| Elizabeth Marshall | Robert and Marie Woodruff |
| Grace Meyerhoff | |

MUMF Ministry Grant Fund

- David & Emilie Atkins
- In memory of Charles McClain
- In memory of Nellie Porch

- Tom and Debra Hilton
 Charles and Rachel Meier Trust
 William and Pam Moench

- Anonymous
 Galen and Linda Bird
 Enterprise Holdings, Inc
 Christina Knott
 Laura Lee Poole
-In memory of Linda Hanson

Neosho UMC Music Fund

- Roy Shaver

Williams Family Permanent Endowment Trust

- Leonard A. Williams

Woodlandville UMC Education Fund

- benefits students needing financial assistance*
 Woodlandville UMC

Jack N. Young Charitable Memorial Fund

- benefits UMC of Gallatin*
 Jack N. Young Estate

Zion UMC of Old Appleton Cemetery Endowment Fund

- Jerry and Pam Leimer
- In memory of Norma Wilkening

Bonem's insights included:

- There are three types of planning – tactical, visionary, and strategic.
- Pastors need to develop a group that can help with the work of strategic discernment – a vision community.
- Mental models are the images, assumptions, and stories we use to interpret our world and guide our actions. Pastors can carry some unhelpful mental models – such as the idea of a pastor as shepherd.
- Spiritual and relational vitality are central to building a culture of change and a coalition of leaders.
- Developing real commitment to a shared vision is the challenging work of leadership.
- Setting goals and measuring progress are important. While measures can be difficult to discover, pick something and measure it consistently.
- Progress may be incremental, but we must always take time to celebrate “wins.”
- He quoted author Robert Quinn, “The land of excellence is safely guarded from unworthy intruders. At the gates stand two fearsome sentries – risk and learning. The keys to entrance are faith and courage.”

All attendees received copies of Bonem's book *Leading Congregational Change*, (<http://mikebonem.com/>) along with other resource materials provided by the Missouri United Methodist Foundation.



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The charitable gift annuity (CGA) is both a gift and planning tool.

To create a charitable gift annuity benefitting your church, you transfer cash or an asset to the Foundation. In return, the Foundation agrees to make payments for life to you, you and a loved one, or another person. Each payment is fixed and the amount of each payment will depend on the age of the person who receives the payments. The table to the right shows a sampling of current rates. Contact us to request a complete, personalized illustration.

Age	Rate
60	4.4%
65	4.7%
68	4.9%
70	5.1%
72	5.4%
74	5.7%
76	6.0%
78	6.4%
80	6.8%
82	7.2%
84	7.6%
86	8.0%
88	8.4%
90	9.0%

By Giving, We Receive

Seeing firsthand how a gift changes lives and brings joy to others can change the lives of those that give.

A charitable gift can have many benefits beyond just helping your church. Strategies, like the charitable gift annuity, provide many reasons to give.

This information is not intended as tax, legal or financial advice. Consult your personal financial advisor for information specific to your situation.

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While a gift annuity can be funded in a number of ways, let's examine the benefits of transferring an appreciated block of stock to fund a gift annuity.

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Many donors appreciate the fixed payments of a gift annuity. A portion of the payment may be tax free. To learn more, visit www.mumf.org or call us at 800-332-8238.

Chris Bouchard

Director of Foundation's New Initiative for Clergy



Excellent pastoral leadership is critical to the health and vitality of every congregation. Studies conducted by the Lilly Endowment indicate, however, that pastoral excellence can be seriously limited by financial stressors ranging from high student debt, to unexpected healthcare costs, to church administrative complexities.

For clergy, the results range from lower productivity to burn-out and premature exit from the profession. For congregations and the mission of the church, the consequences can be equally devastating.

"The financial arrangements that define modern life can be a blessing or a burden for our leaders and those they seek to serve," states Chris Bouchard, the Foundation's Project Director for

its new Clergy Financial Well-being Initiative. "Our clergy must be both theologically and financially literate to truly fulfill Mr. Wesley's charge to make the best of what is in their hands."

As Foundation executive David Atkins explains, "The Lilly Endowment funded this initiative with a three-year, million dollar grant to the Foundation to provide new educational and financial resources for clergy and layleaders. Chris has a terrific combination of skill and experience to lead this start-up."

Chris recently stepped down from the Missouri Small Business and Technology Development Center (SBTDC) where he worked for 24 years, the last five years as the State Director. "I love teaching and working one-on-one with small business owners," states Chris. "This position allows me to go back to what I love to do and develop a program that will improve the lives of people and the churches that serve them."

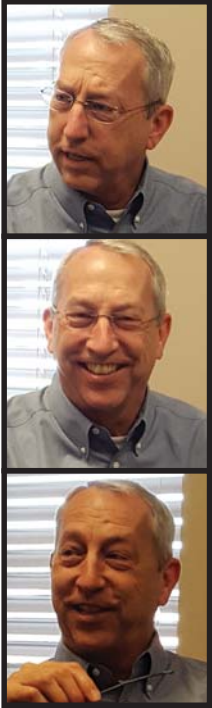
Chris is an elder in the First Presbyterian Church in Columbia, where he has been very active, serving on the board, teaching adult Sunday School, leading a

successful capital campaign and facilitating Dave Ramsey's Financial Peace University programs. Chris's wife, Ann, recently retired as the Director of Christian Education, and they have two grown daughters.

Additional background includes serving as a member of the US Air Force where Bouchard flew B-52's and T-37's and later held positions of financial management officer, budget officer and comptroller of the Lambert Air National Guard unit. He has also owned and operated two successful small businesses.

"We will be introducing Chris during the Annual Conference," states Atkins, "and some of the Initiative's programming will roll out this summer. Our hope is that these resources and support systems become part of the fabric of our connection."

"I look forward to meeting new people and developing friendships all across the state," says Bouchard. "I am also looking for resources and welcome ideas to make this Initiative as effective as possible."



Questions for Chris:

• **A favorite hobby?** I enjoy skiing, which is strange because I hate cold weather... I have a group of guys that plan a trip every year. I love the beauty of the mountains and the fellowship of the trips.

• **A favorite book?** I love to listen to books. One of the best is *The Wright Brothers* by David McCullough. I now have such respect for these men who did so much to change our world while maintaining humility about their accomplishments. It is a must-read for everyone.

• **Most satisfying aspect of church involvement?** Sunday School. We've been attending the same church now for over 30 years and I have regularly attended Sunday School for about 15

years. Sunday School is where I've learned more of the historical context of scripture and the study allows a greater depth of understanding of how scripture can guide our everyday living.

• **A favorite Missouri weekend trip?** We might take in a Cardinals baseball game, Shaw's Gardens and Old Town in St. Charles (my wife loves the shops there). We have two granddaughters in Kansas City, so many of our trips are to that side of the state. I enjoy getting off the interstates, so we once followed the Missouri River to St. Louis. We visited Hermann and then followed Highway 94 to visit the wineries between Hermann and St. Charles.

• **A favorite quote?** "Seek first to understand, and then to be understood." – Stephen Covey

What is the Clergy Financial Well-being Initiative (CFWI)?

The CFWI seeks to reduce or alleviate some of the key financial pressures that inhibit effective pastoral leadership, and improve the financial literacy and management skills of pastoral and lay leaders through education in order to increase their ability to provide capable leadership for congregations and ministries under their care.

New programs and resources will include:

- Incentives for clergy to take part in personal finance education
- Low- or no-cost financial planning and counseling
- Contributions for pastors and congregations that enroll in pension savings programs
- Help for pastors to create emergency funds
- Strategies that help pastors pay down or eliminate educational debt
- Scholarships so that seminarians borrow less while in school

To learn more, contact:
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