



partnering today | shaping tomorrow



COVER & ABOVE PHOTO: *The Foundation's Grants Ministry supported the creation of the Haven UMC's Music School, a community ministry for all ages / East Providence, RI.*

MESSAGE FROM THE BOARD CHAIR & PRESIDENT

Dear Friends and Partners,

Being the church in this moment brings significant challenges and opportunities to share the love of Christ. In 2021, we longed to be together and found ourselves needing to adapt to the risks posed by the pandemic. Yet God is with us, and we found new ways to connect with one another and adapt!

As an independent 501(c)3 organization, our sole purpose is to support the mission and ministries of churches across New England and the New England Conference.

This 2021 Impact Report tells some of the many stories of how we partner with churches and individuals to support and facilitate the ministries of pastors, congregations, individuals, and the New England Conference.

The Foundation continues to provide leadership to all of our partners in the areas of socially responsible investing with impact, growing leadership capacity, providing emergency assistance for the challenges of COVID-19, developing sustained support for racial equity initiatives, and leading the emergence of new ministries through re-purposing real estate assets.

The Foundation's Strategy Working Group also completed a year-long assessment of our priorities for the next 3-5 years. At its April 2021 meeting, the Board of Directors adopted a number of recommendations, which include several criteria for our work:

- giving dominant weight to evaluating Foundation mission and ministries with church partners through a lens of expanding ministry, regardless of whether the partner is experiencing growth or decline.
- encouraging and incentivizing collaboration among churches through multi-year grants in larger amounts for the most important issues facing communities (opioid crisis, climate change, environmental justice, racial justice, et. al.).
- assisting churches in New England and the New England Conference with the faithful stewardship of buildings and financial assets, including repurposing properties to reimagine and enhance local ministries in the community.

We thank God for the opportunity to be your partner in mission and encourage you to let us know how we can better support your ministries.

Yours in Christ,



Pam Carpenter - Chair/Board of Directors



Rev. Ted Crass / Foundation President



FOUNDATION SERVICES

CHURCHES & AGENCIES

- Socially Responsible Investment Management Services
- Grants Ministry
- Justice in Our Time Fund for Racial Equity
- Foundation Forum Educational Series
- Planned Giving
- Stewardship Education & Resources
- Capital Campaigns
- Low Cost Loans

CLERGY

- Innovate.Integrate.Elevate - Pastoral Leadership Development Program
- Financial & Life Planning Education
- Personal Planning Consults
- Pastoral Financial Resources

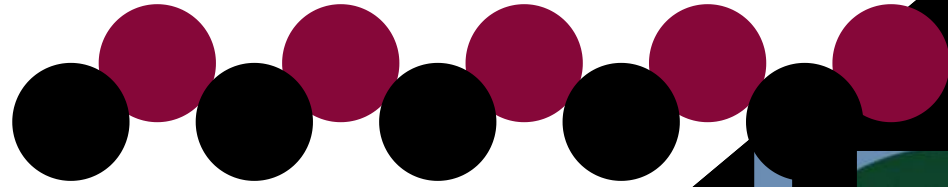
INDIVIDUALS & FAMILIES

- Financial & Stewardship Education
- Trustee Services
- Will & Estate Planning
- Gift Planning Consults





JUSTICE IN OUR TIME FUND



The legacy of inequality and racism continue to impact all sectors of our society, and efforts to address racism tend to ebb and flow from crisis to crisis. Faith communities have a pivotal role to play in sustaining this work for justice.

In response, the Foundation created a new Justice In Our Time Fund to make immediate and long-term impact in anti-racism work through a sustainable model. With a \$900,000 seed donation from the Foundation, and additional contributions from the New England Conference of the UMC and donors, the Fund has grown to \$1.7 million toward the goal of \$2.5 million.

While broad action for racial equity is critical, the type of actions needed differ across New England. The Foundation's Justice In Our Time committee of Rev. Ho-Soon Han, Mr. James Stephen, Pastor Crystal Gardner, Pastor Milka Gonzalez, Rev. Dr. Jay Williams, and Rev. Ted Crass has developed a strategy that will invest in efforts to overcome barriers caused by systemic racism. The committee has identified three key areas to engage: Education and Awareness, Early Childhood Education, and the Wealth Gap / Home Ownership.

The Committee awarded its first grant to the Conference Commission on Religion and Race to build on CCORR's consulting and education training work to support efforts by congregations to engage in antiracist action in their communities. Fund investments in early childhood education, financial literacy and home ownership initiatives are presently being discussed with church and public partners.

Many churches have expressed a desire to participate in the work of anti-racism and have not known how to do so. The Foundation's Justice In Our Time Fund provides a compelling approach for churches and individuals both to demonstrate and to partner together in faithful, tangible action to overcome systemic racism.



[WATCH VIDEO](#)

GRANTS MINISTRY PROGRAM

WAYNE COMMUNITY CHURCH "Community Conversations"

*2021 Rapid Response Grant in partnership with the
Cary Memorial Library in Wayne, ME / Grant Awarded \$2,010*

In this central Maine community, discussions around race and white privilege are generally nonexistent. "Community Conversations" was the project created addressing race awareness using the books *Stamped, Racism, Anti-Racism and You: A Remix*, *Waking up White* and *Call Me American*. A book written for young people, *I'm New Here*, was sent home with the youngest participants to explore with their families. Each book focused on a different perspective including that of an African American, a white person coming to terms with white privilege, the experience of a Somali immigrant to Maine, and an elementary age-appropriate story written by an author who grew up white in South Korea.

The Community Conversations project also purchased 13 different minority-centered books for the Cary Library to expand their childrens' collection. The intent was to guide children and their parents on how to talk about the uncomfortable topic of racism. The chosen books brought stories to life in the day-to-day living of minorities including their struggles and their accomplishments. They also emphasized empathy, taught tolerance and an appreciation of cultural and racial differences.

2021 TOTAL
FOUNDATION
GRANTS
AWARDED:
\$74,881



"This collaboration with our neighbor, the Wayne Community Church, fits perfectly within our expanded mission of reaching more people and providing more stimulating conversations."

Judith Danielson / President Wayne Library Association

“Racism is on people’s minds and many in our community were clearly ready to hear our idea. The hearing turned into forming a plan, seeking grant support, and watching it become a reality. What a powerful and meaningful experience as community people gathered to listen, learn, and discuss this important issue.”

Janet Adelberg, Librarian / Cary Memorial Library

“Partnering with our local library seemed to be a very effective way to engage community members who do not generally participate in our church activities. We also partnered with two Maine authors: Anne Sibley O’Brien and Abdi Nor Iftin which provided personal appeal and authenticity.”

We hope to hold another community book series/conversation together in the future.

Taken from the Church Report



“After the talk by Abdi Nor Iftin, a number of participants indicated that they would be more open to immigrants, more sensitive to racism, and would be interested in finding additional ways to support to the immigrant population.”

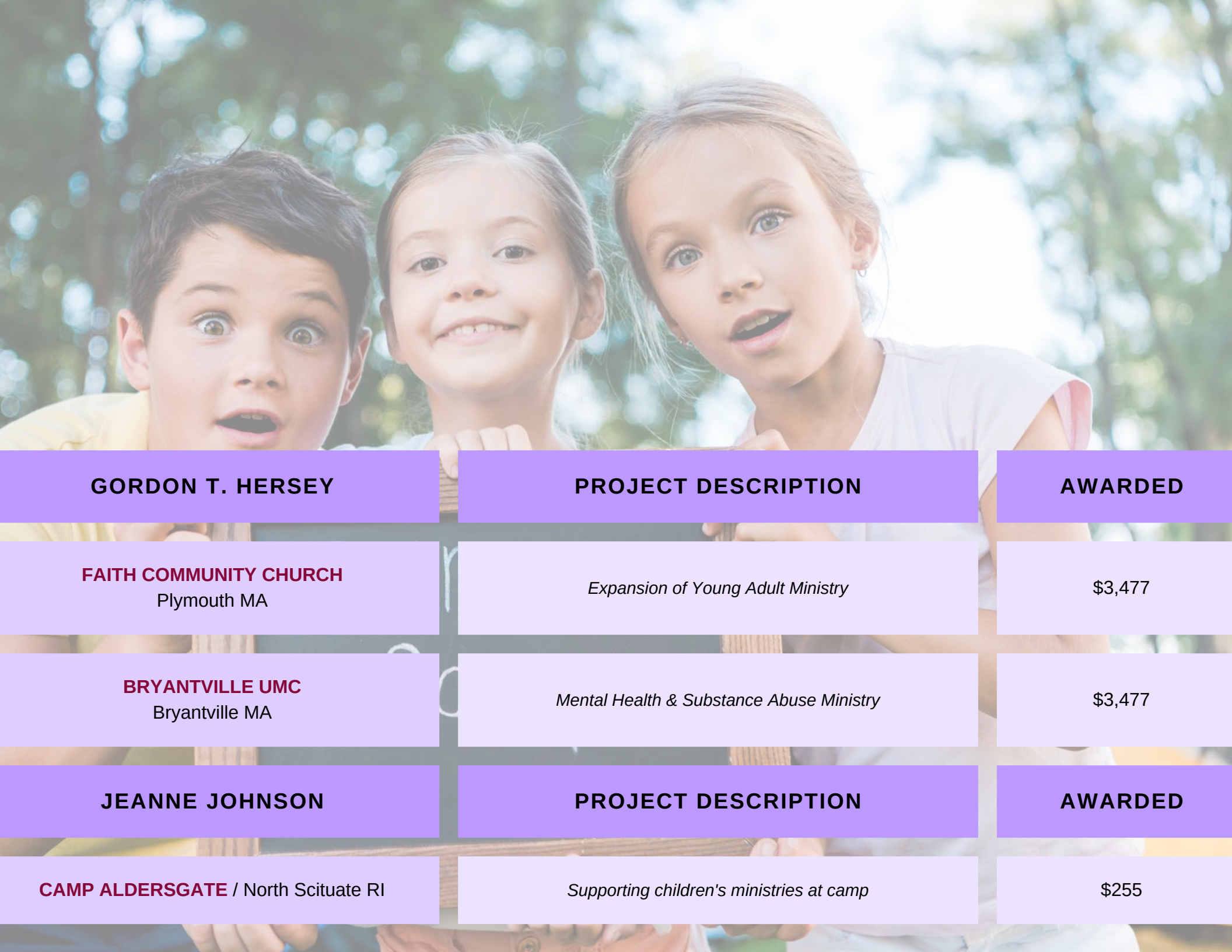


2021 GRANTS MINISTRY PROGRAM RECIPIENTS

ANNUAL GRANTS	PROJECT DESCRIPTION	AWARDED
BROWNSVILLE COMMUNITY CHURCH Brownsville VT	<i>Assist with community involvement & outreach related to building a new outdoor pavilion</i>	\$5,000
FAITH COMMUNITY CHURCH Plymouth MA	<i>South Shore Community Outreach Project including Racial Reconciliation, Recovery, and Economic assisted programs</i>	\$5,000
FIRST COMMUNITY UMC / Medford MA	<i>Building Across Differences in Times of COVID - project with international seminary students at BU sharing experiences in the local church as well as cultural diversity</i>	\$5,000
GREENWOOD MEMORIAL UMC Dorchester MA	<i>Greenwood Shalom Children's Center Summer Enrichment Program provides a safe place to support children's education, spiritual, social, emotional, and creative talents.</i>	\$5,000
HAVEN UMC / East Providence RI	<i>Sharing God's love through multicultural youth chamber string ensemble music project</i>	\$5,000
ORONO UMC / Orono ME	<i>Establishing International Young Adults Group</i>	\$1,230

<p>ST. JAMES UMC / Merrimack NH</p>	<p><i>Community arts ministry where children, youth, and families, within and beyond the church, will experience God's presence through creativity & community</i></p>	<p>\$3,086</p>
<p>UNION CHURCH of BELGRADE LAKES Belgrade ME</p>	<p><i>Technology Upgrade Project to expand in-person & online worship participation to maintain & grow the upward attendance trend over the past year</i></p>	<p>\$5,000</p>
<p>UNION UMC / Boston MA</p>	<p><i>Student scholarships/rental assistance for the Hilda Evans House Intentional Community in partnership with BU</i></p>	<p>\$4,800</p>
<p>RAPID RESPONSE GRANTS</p>	<p>PROJECT DESCRIPTION</p>	<p>AWARDED</p>
<p>SHEPARD OF THE VALLEY / Hope RI</p>	<p><i>Technology & Outreach Initiative</i></p>	<p>\$2,500</p>
<p>EAST PITTSOON UMC / East Pittson ME</p>	<p><i>Wild Church expansion for access, safety, and quality of worship experience.</i></p>	<p>\$2,500</p>
<p>WAYNE COMMUNITY CHURCH & CARY MEMORIAL LIBRARY / Wayne ME</p>	<p><i>Community Conversations of Race - educating & reflecting on white privilege & racism</i></p>	<p>\$2,010</p>
<p>CHRIST UMC / Kingston RI</p>	<p><i>Online broadcasting - planting Christian spiritual seeds</i></p>	<p>\$2,500</p>

<p>MATHEWSON STREET UMC Providence RI</p>	<p><i>Assistance to expand Capital Campaign reach & impact</i></p>	<p>\$2,500</p>
<p>ASBURY UMC / Warwick RI</p>	<p><i>Food for the Soul - Meals to go for those in need</i></p>	<p>\$2,500</p>
<p>UM CHURCH OF ENFIELD / Enfield CT</p>	<p><i>On-line & in-person worship technology improvements & training</i></p>	<p>\$2,500</p>
<p>LEXINGTON UMC SOCIAL JUSTICE</p>	<p>PROJECT DESCRIPTION</p>	<p>AWARDED</p>
<p>BOSTON FAITH & JUSTICE NETWORK Boston MA</p>	<p><i>Foundational Principles of Financial Literacy & Biblical Generosity video/on-line series</i></p>	<p>\$2,000</p>
<p>EVONE MINISTRIES / Contoocook NH</p>	<p><i>Antenatal Clinic for Primaravida Girl Child in Ruboni Uganda</i></p>	<p>\$2,500</p>
<p>CONNEXION UMC / Somerville MA</p>	<p><i>The Connexion Collection: Free Public Library</i></p>	<p>\$2,200</p>
<p>COMPANIONS IN WHOLENESS Rutland VT</p>	<p><i>Support of the Comfort Zone ministry with purchase of commercial convection oven</i></p>	<p>\$2,500</p>
<p>THRIVE COMMUNITIES OF MA Lowell MA</p>	<p><i>COVID 19 response for services provided</i></p>	<p>\$2,500</p>



GORDON T. HERSEY

PROJECT DESCRIPTION

AWARDED

FAITH COMMUNITY CHURCH
Plymouth MA

Expansion of Young Adult Ministry

\$3,477

BRYANTVILLE UMC
Bryantville MA

Mental Health & Substance Abuse Ministry

\$3,477

JEANNE JOHNSON

PROJECT DESCRIPTION

AWARDED

CAMP ALDERSGATE / North Scituate RI

Supporting children's ministries at camp

\$255

A LEGACY OF HUMILITY

Interview Conducted by Gary Melville/Director of Development

I was introduced to Harvey Boatman through the gift planning process offered at the Foundation. Throughout our discussions I found Harvey very humble and self-deprecating. The idea of agreeing to an interview was unsettling for him. Harvey is not one to toot his own horn. I discovered why during our time together.

Harvey is not a “true” Mainer, being a transplant from Pennsylvania. However, growing up on a farm and loving the outdoor life allowed for a seamless transition into life in Maine. And working for the Scott Paper Company added to his Maine credentials.

As a young man in college, he married Jenny, his childhood sweetheart. After college, he enlisted in the Navy, serving in Viet Nam and then going on to earn his MBA at Penn State. As a new hire to Scott Paper, the management apologized because the only opening at the time was at the Winslow Mill plant in Maine. *“I always wanted to live in a place like Maine. I love to hunt and fish, I love the outdoors, so I grinned behind my hand and said I’d love to go to Maine”.*

Harvey went through a divorce after 23 years of marriage. It was a difficult time for his four children. But, as time often provides, the pain eventually subsided. He met Dale, a woman recovering from the tragic deaths of her husband and son, both from separate accidents.

Harvey’s faith journey began in the Lutheran Church with a brief period in the Congregational church. His United Methodist Church roots are firmly planted in the Wesleyan tradition; evidenced by his frequent visits to the Jesse Lee Church in Readfield Maine where Dale, the love of his life, grew up.

His spiritual pilgrimage truly began on his “Walk to Emmaus Weekend”. *“For the first time in my life I felt forgiven. The amazing Grace of God was very powerful. I felt empowered, it was a different relationship with God that had formed. I suspect the kids that go on the pilgrimage to Taizé have a similar deep and rich experience in recognizing a relationship with God. The biggest argument I have for church is the explosion of energy when a group get together and honestly worship.*



Harvey & Dale

And it happens when kids, either at church camp or through a pilgrimage get together with their peers and discover Jesus Christ in each other, at a different level – you can't really get away from it for that short period of time. It's right there, it's in your face – if not yelling at you, it is calling to you."

I asked Harvey how this experience shifted his thinking and generosity.

"I discovered that I didn't need to go look for an opportunity to serve, that it was often right in front of me. People all around us are going through things that are equally or more profound than anything we are experiencing at that moment. And if we are sensitive to that, and open to it, sometimes we get a sense of it. And when we do, it is a gift. We recognize something in the humanness of someone else that needs a hand. And the hand might be a simple applause. Or the hand might be a help of some kind. After Emmaus, you get more sensitive to the needs of others in the rest of your life thinking."

I then questioned how he wanted to be remembered and what legacy means to him.

After a pause he said, "I guess if they miss me that's enough. For the kids and the grandkids, I've got 10 grandkids, I think about values rather than money. Fortunately, the grandkids like spending time with me. I've got lots of fun toys like tractors. I hope they fondly remember the times we shared together, the things I taught them, and the things they taught me. I start with the fact that I

have enough. And secondly, I probably have too much. And when I look at that "too much" I think that is a legacy I can pay forward. I want the kids/grandkids to think of me in terms of what should we do with this "too much", because it will be too much for them as well. That brought me to the realization of how I can take some of this "too much" and put it someplace else. I want it to continue to do good as I have done with the excess in my own life today – present tense. The Foundation offered me a way to think of a bequest that renews itself and continues on, even if my name is not associated with it. That's ok, as it's not necessary to have my name associated with it. Although at the beginning I like that they will know that it is money that I set aside to do good because that is a challenge. I did not feel comfortable with leaving money to my church, even though I had that included in my will. I am not confident that, over time, it will be spent well. And again, the Foundation the offers me a way to mitigate that concern."





I believe that Harvey's humility is fostered by his farming avocation. At 75 years old, Harvey manages an apple orchid, grape vineyard, various berry shrubs, vegetable garden, and a wood lot on his 20-acre "church". I say church because it is where Harvey is encouraged to be still and know that God is with him. From a young boy, Harvey always sought the outdoors for solace and enjoyment.

He said, *"So these kinds of things go deep within me, in my connection to land and water. Not that long ago, I went through the woods to a friend's house, and I came to a brook and found a bench. I sat down to take a rest. I was tired, hot, and sweaty because I had been working hard. I was listening to the brook and got up and walked around to the back of the bench and saw - 'Be Still and Know that I Am.' That's what I get from the land."*

After my interview with Harvey, I felt as though I had been on a walk in the woods. I was still and knew that God was here. That was a gift.

GENEROSITY: Jesus is the Center



Bob & Jana

This story began over eight years ago with an estate and gift planning workshop at the Leominster United Methodist Church. Later, I was pleasantly surprised when I received a phone call from Jana Harrison who had attended a gift planning workshop provided by the Foundation in partnership with her church. Jana and Bob were interested in making a planned gift and needed assistance. Fortunately, I knew their financial planner, Janice Swenor, who had organized the workshop at church. The Harrison's plan included a gift annuity which would provide them guaranteed income during their life and establish a permanent endowment in their name upon death.

Due to the Covid pandemic, the concept and details were discussed on the Harrison's deck, and after a couple such meetings, the gift annuity agreement was signed. A year later, I met with them again, on their deck, and conducted an interview to get to know, as Paul Harvey used to say, "the rest of the story." I learned that they met at a party, and soon began dating and then married two years later. Jana and Bob have three children: Kendra, Joy, and Robbie, and two grandchildren. Bob was a math teacher and also worked part-time in two prisons while Jana specialized in early childhood education. While their education and careers provided common ground, their faith backgrounds were very different.

Bob grew up Catholic and Jana came from a liberal American Baptist upbringing. Bob's faith was tepid when they met, but he found her knowledge of prayer and scripture attractive. Jana shared that when her father died, he left her mother a widow with four children at the age of 54. Despite this adversity, her mother was a strong woman of faith, and her first response was to pray.

Bob's faith blossomed in this environment of example. When they moved to Leominster, MA, they found a second home within the Leominster UMC. Rev. John Camp was the pastor and a good friend. Bob shared that he loved when John answered the phone and he would say, "Jesus loves you and so do I."

Having a pastor that is enthusiastic about sharing the love of Jesus provided a disciple's example. Bob volunteered at two prisons as a math teacher and seeing this as a ministry, often shared his Jesus with the men inside. Bob also used his gift of teaching by leading the Adult Bible Study at church. For Bob, bible study was not just learning about Jesus, but about knowing Jesus personally.

Jana's gift of early education grew into heading up the nursery and preschool programs at church. Her adult connections come through United Women of Faith (formerly United Methodist Women), and has not only become a mission but her ministry as well. She found that the organization's focus on mission and women aligned with her own thinking and faith journey.

For Jana and Bob, their growth in generosity paralleled their growth in their relationship with Jesus. Giving to church is not a financial transaction, but a disciple's response to the sacrifice of the Cross and the gift of Resurrection.

When I asked about who influenced their generosity, Jana's mother Ethel was their first thought. Ethel was the personification of generosity. So, when it came to financial giving at church, Jana learned from an early age the concept of tithing. Jana said, "tithing is part of being a disciple." Bob quoted Malachi, "Bring the full tithes into the storehouse, that there may be food in my house; and thereby put me to the test..." It was natural jump for them to think of a planned gift because generosity and going to church was, as Bob stated, "automatic."


Jesus has always been at the center of their lives, especially now. Jana echoed Bob on this as he shared that retirement has been a struggle, and how he relies heavily on his relationship with Jesus to help him navigate this new chapter of life.

Bob and Jana provide us with an example of generosity seen in those with a long and deep relationship with Jesus. It is something to aspire to, something to celebrate, and something that has made a life altering difference.



INNOVATE. INTEGRATE. ELEVATE

Pastoral Leadership Development Program



Foundation Staff welcome the Innovate 2 cohort to their final gathering at the Wylie Inn and Conference Center in Beverly, MA.

Innovate, Integrate, Elevate (IIE), is the Foundation's pastoral leadership development program designed to create strong, healthy communities (cohorts) for pastors to continue to grow closer to Christ and to act as an agent of change in God's Kingdom.

In 2021 the program regained its momentum and rebounded from the 2020 Covid induced pause. With a hybrid of online and in person events, Innovate 1 concluded their program in October. Innovate 2 continued to immerse themselves in the resources and knowledge that their peers and conversation partners offered.

We saw the continued development of the Elevate-Boost online cohort for multi-vocational pastors (MVPs.) Their one in person retreat was delayed due to Covid-19 but we are looking forward to the rescheduled retreat taking place in January of 2022.

2021 also brought about the creation of two new cohorts. The Elevate-Jumpstart cohort is for pastors seeking to name, explore, and address contextual ministry challenges. The Integrate cohort is for Korean pastors serving in crosscultural/cross-racial appointments. These groups have proceeded to fully engage in conversations and action around stewardship, difficult conversations, and leadership.

Moving forward in 2022, we are looking forward to seeing the development and continued success of our current cohorts while welcoming at least two new cohorts, Innovate 3 and Elevate-Boost 2.

*This program is partially funded by a Lilly Endowment **Thriving in Ministry** grant.*

QUOTES

Cohort members and Conversation Partner enjoy a meal together.



“Innovate was a gift in the midst of a very challenging season. The collegial support, excellent conversation partners, and relevant, directly applicable tips and resources fed my mind, heart, and soul. It made ministry in the midst of the pandemic feel less daunting and reminded me I was not alone in the uncertainty of it all.”

Heather Bailes Baker

“Normally at these types of retreats I am just thankful for the time away but, at Jumpstart, my mind and pen were racing with possibilities for my personal and ministry life.”

Anonymous

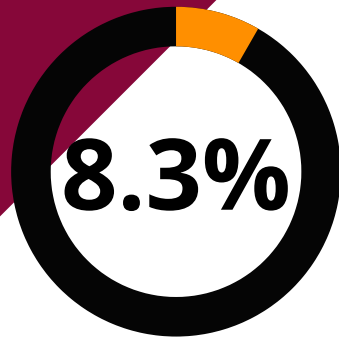


Jinyong Choi and Myung Eun Park engage in conversation during a retreat in Falmouth, MA

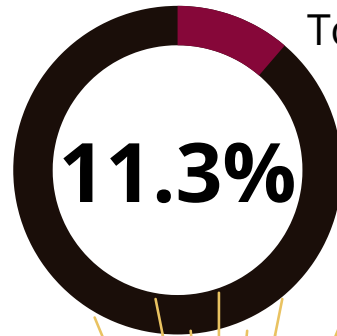


A LOOK BACK TO 2021

Total Assets Under Management.....	\$139,984,118
Loan Portfolio Total.....	\$ 4,004,102
Awarded from Grants Ministry.....	\$ 74,881
Total Distribution to Churches.....	\$ 9,079,768



INCREASE IN TOTAL ASSETS UNDER MANAGEMENT



BALANCED GROWTH FUND RETURNED FOR THE YEAR

BALANCED GROWTH MODEL

60% Stock / 40% Fixed Income

- 1 YEAR / 11.32%
- 3 YEAR / 13.66%
- 5 YEAR / 9.37%
- 10 YEAR / 8.06%

STOCK MODEL

100% Stock

- 1 YEAR / 20.10%
- 3 YEAR / 20.74%
- 5 YEAR / 14.22%
- 10 YEAR / 12.40%

WEIGHTED GROWTH & INCOME MODEL

70% Stock / 30% Fixed Income

- 1 YEAR / 13.51%
- 3 YEAR / 15.43%
- 5 YEAR / 10.58%
- 10 YEAR / 9.14%

FIXED INCOME MODEL

100% Fixed Income

- 1 YEAR / -1.86%
- 3 YEAR / 3.04%
- 5 YEAR / 2.10%
- 10 YEAR / 1.54%



ASSETS:

Cash & Cash Equivalents.....	\$ 1,788,053
Investments & Endowment.....	\$134,156,450
Loans Receivable, Net.....	\$ 4,004,102
Property & Equipment.....	\$ 19,662
Other Assets.....	\$ 15,851
TOTAL.....	\$139,984,118

LIABILITIES & NET ASSETS:

Accounts Payable & Accrued Expenses.....	\$ 157,087
Obligations for Funds Managed for Others.....	\$ 129,291,125
Annuities Payable.....	\$ 504,994
Total Liabilities.....	\$ 129,953,206
Net Assets without Donor Restrictions.....	\$ 5,290,366
Net Assets with Donor Restrictions.....	\$ 4,740,546
Total Net Assets.....	\$ 10,030,912
TOTAL.....	\$ 139,984,118

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