

2024

By the Numbers



Over

\$170,000

Committed in justice and ministry grants.

\$7,548,906

Distributed to churches.

307

Churches and agencies invested with the Foundation.

More than

Grants awarded to organizations and churches in New England.

30

346

Invested accounts enrolled in the fixed % payout.

5

New or refinanced loans supporting New England church buildings.



Over

50

Churches engaged with the Wesley Development Group.

33

Stock donations processed to benefit local churches.



\$145,989,867

Total assets under management.

31

Preaching Engagements.



27,256

Miles traveled to partner with churches.



93

Total participants in the Foundation's IIE Leadership Development Program.

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EQUIPPING MINISTRIES ACROSS NEW ENGLAND

Dear Friends,

The United Methodist Foundation of New England exists for the purpose of supporting the mission and ministries of New England churches, the Conference, and individuals. As the landscape for ministry changes with new expressions, the Foundation is committed to being a steady partner for churches in their most pressing missional needs as they share the love of Christ.

At the heart of our work are partnerships: with the churches, ministries, individuals and, of course, the New England Conference. Our partnerships often address the structural underpinnings that ministries require to complete their missions. We know that our ministries have a profound impact on the capacity of individuals and churches and influence their ability to serve.

In this report, we highlight just a few of these partners, including clergy leaders Myung Park and Milka Gonzalez, Justice For Our Neighbors, Vibe and Verse, and key milestones in our ministries during the year.

In 2024, we also welcomed the appointment of Bishop Thomas Bickerton to New England and to the UMFNE Board of Directors. His leadership of the New Hope Episcopal Area includes both the New England Conference and the New York Conference of the United Methodist Church. We greatly anticipate the leadership of Bishop Bickerton and the potential for collaborations with sisters and brothers in Christ from New York to Maine.

We thank God for the opportunity to be your ministry partner in sharing the love of Christ as we seek to faithfully steward assets and innovate for missional impact.

Yours in Christ,

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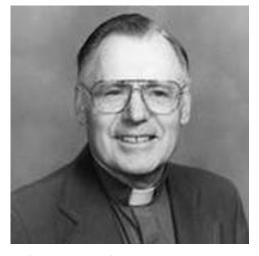
Pam Carpenter Chair, Board of Directors



Rev. Ted Crass President

The Profound Impact of Legacy Gifts:

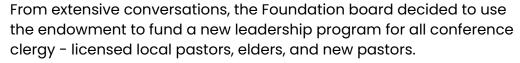
The Foundation's Gift Planning work helps faithful folks take their place in the ongoing story of the church. Rev. Paul N. Whitteberry gave much to the New England Conference with both his heart and his hands. The Indiana native, World War II veteran, and Boston University School of Theology graduate was a pastor for 38 years at 10 churches in the New England Conference. During those years, he spent extra hours repairing and restoring the church buildings where he ministered. After he and his wife Marjorie sold a Massachusetts campground they owned and operated, he set up a revolving loan fund that conference congregations could use for repairs and financial emergencies.



When Rev. Whitteberry died in October 2014, he left the United Methodist Foundation one last, unexpected gift: A \$1.2 million endowment, with no restriction on how the money could be spent.

"It's been significant in shaping our ministries."

"We were shocked," Foundation Chief Financial Officer Pam DiMartino said. "We work with individuals, congregations, and clergy every day to help them understand options and realize their legacy plans. I don't know of a larger amount we've ever received. It's been significant in shaping our ministries."





The gift helped the Foundation to hire David Abbott to develop and lead the program. The Whitteberry Endowment would have funded a much smaller leadership program, but the Foundation applied for and received a multi-year, \$930,000 Lilly Endowment "Thriving in Ministry" grant, "so we could expand the use of the Whitteberry gift," DiMartino said.

While investment income from the Whitteberry endowment does cover the Foundation's match for the Lilly grant, it also provides the seed funding for the Foundation's Justice In Our Time (JIOT) Fund and program. With additional contributions from the New England Conference, The Preacher's Aid Society, and other churches and individuals, the fund has grown to more than \$1.6



million. The JIOT program engages racial equity work, such as the Greenwood Shalom Zone, a remarkable early childhood development program in Boston's Dorchester neighborhood.

Rev. Paul N. Whitteberry



Developing Church Leadership



Leader Spotlight:

Rev. Myung Park's diverse ministry journey—from licensed local pastor to ordained elder—has been enriched by the United Methodist Foundation's leadership development program.

"We are on the journey to inclusivity," said Park, pastor of Grace UMC in Lynn, Massachusetts, "just like John Wesley."

Originally from South Korea, Park moved to Massachusetts in 2007, earning her MDiv from Boston University in 2012. After serving in West Bridgewater, MA, and Readfield, ME, she was appointed to Grace UMC in 2021.

Since 2019, Park has been part of the Foundation's Innovate cohorts. Currently, as part of the Innovate for Women Cohort, she meets with seven other women pastors from across the New England Conference to explore leadership through their intersectional identities. The program brings nationally known thought leaders to engage the cohort in deep learning. One speaker was pivotal in inspiring Park to lead her church to build relationships "outside the church walls."

In response, Grace UMC launched Church On The Move in 2024, holding meditative walks at Nahant Bay beach. The church also increased community engagement through Lynn's diversity festival, a local barbecue, and informal gatherings at restaurants. Park and four congregants are now also part of the Foundation's ACTIVATE cohort, discerning and designing a new ministry to meet community needs.

Thanks to the Foundation and the Innovate program, Park said, that with her leadership "there is less resistance to doing things outside the church."

ACTIVATE: A Call for Impact

In 2023, as the leadership development program transitioned out of the challenges of the COVID-19 pandemic, the Foundation

undertook a reflective process to assess the impact of the Innovate, Integrate, Elevate (IIE) program. Strengthened assessment tools confirmed that clergy participants felt deeply supported in their calling, experienced renewed spiritual connection,

and grew in leadership and ministry innovation.

However, while personal and congregational transformation was evident, there was a gap in

measurable community-level impact and sustained congregational change. Additionally, IIE graduates began asking, "What comes next?"

The Foundation team began exploring possibilities and opportunities to help pastors and congregations seeking deeper engagement to translate learning into action. These resulting insights led



to the creation of ACTIVATE, a new phase of IIE focused on equipping clergy and lay teams to implement community-based ministry

initiatives. Through in-person visits with church leaders, the Foundation created a pilot program to encourage and equip congregations for action. In 2024, four congregations committed to the ACTIVATE program: Greenland UMC (NH), Grace UMC (MA), Arnold Mills UMC (RI), and Wesley UMC (NH), with 23 participants engaged.

Early feedback highlights ACTIVATE's impact in fostering shared leadership, empowering lay members, and shifting ministry ownership beyond clergy. Teams are actively mapping community assets, forming local partnerships, and developing ministry initiatives in areas such as mental health support, refugee assistance, and outreach and support for unhoused families.

As these projects take shape, ACTIVATE is serving as a vital next step in helping congregations to innovate in their communities and share the love of Christ.



Leader Spotlight:

As a licensed local pastor in Salisbury, Massachusetts, Milka Gonzalez says she has received invaluable help from a cohort of fellow clergy in the Foundation's leadership development program.

"I have less experience as a pastor," the Dominican Republic native said, "so I find support from colleagues in the relationships, the networking." Gonzalez has been the pastor at East Parish United Methodist since 2022. She immigrated to the U.S. in 1997 and first worked as a medical, social,



and legal translator at the University of Massachusetts Memorial Medical Center in Worcester. She always attended church, and found her call to ministry from years of activity at the Jesus Life Center, a multicultural United Methodist church plant in Worcester. She received a Master of Theological Studies degree from Boston University in 2024.

Gonzalez has been one of eight female pastors of an Innovate cohort for two years. The other seven members are ordained elders, and Gonzalez says she talks with them about everything from community outreach to how to run the church office as the only staff person. She also relies on them for advice on how to lead a mostly white congregation as a woman of color. "You have to work harder," she says. The group gathers for retreat-style meetings twice a year. Gonzalez keeps in touch with them by email and lunch meet-ups, and she always looks forward to the contact. The relationships formed in the program have been very helpful in leading ministry.

Creative Loans That Finance Ministry...

The Foundation's Loan Program continues to evolve and adapt to meet the needs of New England churches. Churches encounter a myriad of financial challenges in the mission field, and the Foundation's team stays agile to find creative solutions for ministry. The work that New England Justice For Our Neighbors (New England JFON) is doing with support of the Foundation is an example of the loan program's Credit Line Funding and integration with the Foundation's Justice In Our Time partnership initiative.

New England Justice For Our Neighbors

"...it gives all of us peace of mind if we have a short-term cash problem, or a deferred grant. We're really grateful for it."

In 2013, the New England Conference launched a single immigrant-aid program that provided legal assistance for asylum seekers at the HopeGateWay congregation in Portland, Maine. In 2015, the Conference decided to create New England Justice For Our Neighbors and expand into Massachusetts, resulting in 5 legal clinics. Organizers turned to the United Methodist Foundation to help put the clinics on firm financial footing.

In 2024, New England JFON received a federal subcontract, bringing the opportunity to expand ministry by 400 percent. However, there was also a key issue: How could New England JFON carry out services when federal payments can be unreliable? Accordingly, New England JFON requested Foundation support. The Foundation created a new low-interest line of credit that could be used to cover expenses if federal aid reimbursements are delayed or pulled. As New England JFON had no significant assets of its own, the Foundation engaged the New England Conference Trustees as a partner to develop and provide an innovative financing arrangement – a guaranteed credit line as a back stop to support New England JFON.

"We have not used it yet," said Jenna Andelman, New England JFON Director. "But it gives all of us peace of mind if we have a short-term cash problem, or a deferred grant. We're really grateful for it."



...at Work in Our Community!

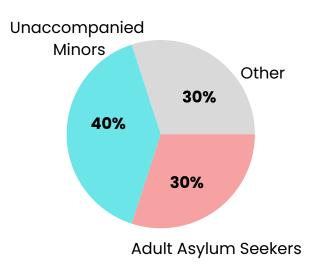


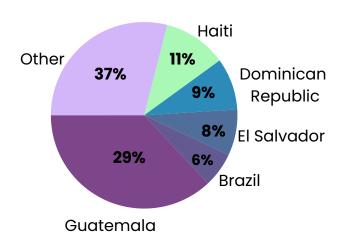
New England JFON's recent cases include Ahmet and Fatma, a young Turkish couple who had to flee the threat of political imprisonment, and Yosselin, a young Guatemalan woman who fled gang threats. New England JFON helped Yosselin gain Special Immigrant Juvenile status, her first step to becoming a permanent legal resident. Ahmet and Fatma received their green cards in late 2023.

With the help of grants and support from across the New England Conference, New England JFON now provides free legal advice and court representation for more than 400 adults and children from 36 countries and 38 Massachusetts towns and cities in 2024.

N.E. JFON Service Type

N.E. JFON Clients' Top Five Countries of Origin





40 percent of New England JFON clients are unaccompanied minors and 30 percent are adult asylum seekers. Clients come from 36 countries, the top five are Guatemala (29%), Haiti (11%), Dominican Republic (9%), El Salvador (8%), and Brazil (6%).



Grants To Equip New Expressions of Ministry

2024 Grant Awardees

Lexington UMC Social Justice Fund Grants

- Cathedral of the Beloved (Pittsfield, MA)
 - Community Relationship Building
- UMC of Auburn (Auburn, ME)
 - Asylum Seekers Resettlement Program
- SAFE HAVENS (Boston, MA)
 - Staying Safe with Faith
- THRIVE MINISTRIES OF MA (Lowell, MA)
 - Circle Keepers Initiative
- Harvard-Epworth (Cambridge, MA)
 - Faith and Land-Based
 Upstanders Academy 2
- Limestone UMC (Limestone, ME)
 - Transportation Transformation
- Young Prophets Collective (Somerville, MA)
 - Prophetic Preacher Project
- Maine Council of Churches (Portland, ME)
 - Faith Based Advocacy Series
- Old South UMC (Reading, MA)
 - Ukrainian Support Project

Gordon T. Hersey Fund

- Church Hill UMC (Norwell, MA)
 - Exploring Family Worship Service
- Harbor UMC (Scituate, MA)
 - Community Outreach Programs
- South Shore Cooperative Parish (South Shore, MA)
 - Outreach Programs

Rapid Response Grants

- Companions in Wholeness (Rutland, VT)
 - Winter Needs for Homeless in Rutland County

Vibe & Verse Project

As he worked with the teenagers of immigrants at First Community United Methodist Church in Medford, Massachusetts, Boston University student Oscar Olmos noticed "a feeling of disconnect" that the youth had with the conventional Sunday worship services.

"They couldn't find their spirituality reflected in the spaces that were supposed to nurture their spirituality," said Olmos, who is from Colombia and is pursuing a Master of Divinity degree at Boston University's School of Theology. So he designed a program where they could listen, be heard, and reimagine worship.

Vibe & Verse is funded by a Foundation grant to the Medford church. Two groups of about a dozen each – one for teenagers, the other for college-age adults – have been gathering every month since August 2024 over pizza or Thai food, to share their hopes, fears, and questions. The groups include Catholic and Evangelical youth as well as United Methodists. Some are the children of African, Asian, and Latin American immigrants.

In May, the two groups will hold what Olmos calls



a Big Gathering Celebration, to mark Vibe & Verse's first year. The celebration will feature music, artwork, and yes, a meal. But he says it won't be a worship service - at least not the kind most churchgoers are used to.

"The Big Gathering is not intended as a model for church," Olmos said. "It will be a natural expression of who we are becoming, together."

Along with providing the two groups a safe space, Olmos says Vibe & Verse has helped connect him and others to the wider immigrant community. He expects the monthly get-togethers will continue, but he says it is too early to tell what Vibe & Verse will become next year or the year after.

"The most important element isn't the structure," he said. "It's about relationships."



Rapid Response Grants Cont.

- Harvard-Epworth UMC (Cambridge, MA)
 - Faith and Land-Based
 Upstander Academy 1
- Harbor UMC (Scituate, MA)
 - Yoga Ministry
- Community UMC (Wayland, MA)
 - Youth Mission Week
- Greenland UMC (Greenland, NH)
 - Live Streaming Ministry
- Rockville UMC (Rockville, CT)
 - Leap of Faith Outreach Choir

Annual Grants

- Camp Mechuwana (Winthrop, ME)
 - Youth Leadership Program
- West Chelmsford UMC (North Chelmsford, MA)
 - Community Connective Meal Ministry and Messy Church
- Wesley UMC (Concord, NH)
 - This Possible Kindom: A residency of the Iona Wild Goose Resource Group
- Haven UMC (East Providence, RI)
 - Community Music Project
- Franklin UMC (Franklin, MA)
 - Initial Resourcing for Community@Franklin Ministries
- Vassalboro UMC (Vassalboro, ME)
 - Building accessibility to support new community connections and ministry
- Thrive on Campus Ministry (Cambridge, MA)
 - Meaningful Meals Kitchen Project
- First Community UMC (Medford, MA)
 - Vibe and Verse Project
- Greenwood Memorial UMC (Dorchester, MA)
 - Dual Project Screen System
- Suncook UMC (Suncook, NH)
 - Monthly Youth Group Program

Leading Churches to...

In 2024, the Foundation's Wesley Development Group (WDG) continued its mission to help congregations redeploy their buildings and properties to empower and sustain viable ministry. The consulting practice served 25 churches in 2024, and many others through shorter-term advising and analysis. Demand for consulting remains strong moving into 2025.

WDG Overview:

- Over 50 churches served since 2023.
- 💬 Key outcomes: Hope, Purpose, and a Plan.
- Additional churches supported through short-term advising.
- Church leaders said WDG:
 - Helped congregations "face the reality" of economic conditions
 - Brought "a new perspective and clarity" through "a comprehensive and helpful look at the possibilities" for churches
 - Taught churches "how to have hard conversations without upheaval."
 - "Brought [members] closer"
 - Assisted many New England churches in discovering major building users to provide financial support to their churches and community resources to their neighborhoods



Team members described the consultants as "persons of faith [they] could trust," and leaders of "thoughtful and honest conversations" with "both the knowledge and experience of professional consultants and the spiritual care and grace of pastors."

In Partnership with the New England Conference:

The Wesley Development Group works with the Conference office to manage Conference-owned properties and also to manage and evaluate some closed church properties for repurposing or sale on behalf of Conference Trustees. The team prioritizes honoring the selfless giving of past generations in a way that robustly supports future United Methodist mission and ministry.

...Missional Building Strategies

MAINE

WDG New England Impact Map

A ME church decided to sell its parsonage, with the investment income from the sale exceeding the effort and long-term costs involved in continuing to rent the house.

VERMONT

NEW

HAMPSHIRE

RHODE

ISLAND

MASSACHUSETTS

CONNECTICUT

A ME church merger included the selling of a church building, so that the newly formed congregation can benefit from the proceeds.

A NH church decided to sell their church building and relocate to a space that better suits their ministry.

A MA church invited another church to share its sanctuary—the new congregation now provides financial support to the host church while gaining access to affordable worship space.

A CT church
discerned that it
could profit from
selling a building
that required
major capital expenditures and
was not directly connected to its
ministry.

A MA church focused on "church dating" to find a match for a merger.
Having found their new partners for ministry, the merged church will benefit from the invested proceeds of the sold church building without the maintenance challenges of the past.

An urban MA church entered into conversations with a local Community Development Corporation for a major, transformational development project that came from community partnerships and the consulting engagement. They have engaged WDG to represent them at these meetings.

A RI church determined that excess land holds enormous potential for affordable housing development and entered into conversations about development in a way that benefits the church, the neighbors, and a school.

Developing A Foundation Theory of Change

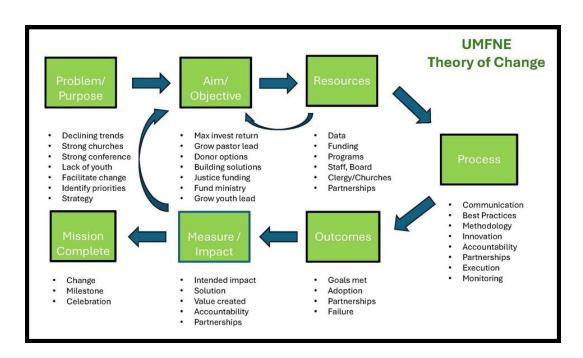
The Foundation seeks to model good stewardship of assets as we follow the leading of the spirit.

In 2024, the UMFNE Board of Directors concluded a year-long series of meetings in pursuit of a deeper understanding of the impact and effectiveness of UMFNE ministries.

In September 2024, the Board adopted a

Theory of Change model for the Foundation.

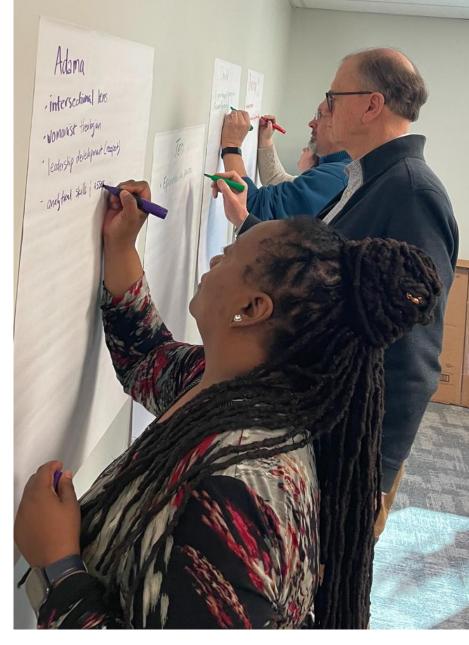
A Theory of Change is a theory about which actions or interventions will create faithful change. In our missional context, we ask how can we be open to the work of the spirit as we engage ministry challenges, examine problems, explore assumptions, and map out the actions that are needed.





With the guidance of Board Member, Rev. Dr. Adama Brown and President Ted Crass, the Board carved out working sessions at each board meeting to perform a SOAR analysis, link the analysis to UMFNE ministries, and then to do an analysis of impact at a working retreat. This work delivered several key learnings for a changing church landscape, including the primacy of Christcentered spiritual rootedness, working partnerships with churches and the Conference at all levels, and continuous reflective learning.

The Board adopted a model of ministry analysis, and in the first half of 2025, the Foundation staff is taking each of our ministries and working them through the model. These presentations analyze one UMFNE ministry (investments, grants, stewardship, WDG, loans, leadership, or gift planning) and solicit feedback





from other team members to yield insights for a deeper understanding of the key elements of change and ensuring opportunity for innovation across all ministries.

As the Board and management of UMFNE seek to be Christ-centered stewards of resources entrusted to the Foundation, we continue to pursue best practices and strategies that deliver impact for our church, individual, and conference partners.

2024 Financial Summary

Statement of Financial Position

As of December 31, 2024

Total Assets	\$	145,989,867
Other Assets	_	40,909
Operating Lease Right-of-Use Asset		101,375
Property & Equipment		14,309
Investments		139,061,993
Loans Receivable		3,345,504
Cash Reserves		537,291
Cash & Cash Equivalents	\$	2,888,486

Liabilities and Net Assets

Operating Lease Liability	\$ 117,254
Obligations for Funds Managed for Others	132,517,599
Accounts Payable & Accrued Expenses	329,621
Annuities Payable	637,204
Total Liabilities	133,601,678
Net Assets without Donor Restrictions	7,579,095
Net Assets with Donor Restrictions	4,809,094
Total Net Assets	12,388,189
Total Liabilities and Net Assets	\$ 145,989,867



\$3,345,504 represents 27 loans to New England churches that allowed them to more efficiently carry out their ministries.

\$139,061,993 invested with a focus on socially responsible investments and United Methodist Social Principles.

\$12,388,189 invested in carrying out the legacy of donors.

Statement of Activities

Year Ended December 31, 2024

Operating Activities

Revenue and Other Suppor	Revenue and	d Other	Support
---------------------------------	-------------	---------	---------

Nonoperating Activities

Investment Income, Net

Net Assets, End of year

\$ 1,951,347
358,989
287,035
2,597,371
1,629,544
318,959
16,787
1,965,290
632,081
\$

- Financial Highlights

\$1,628,368 revenue generated and reinvested back into New England churches and communities through programs, presentations, and grants.

\$7,548,906 distributed to churches and agencies to carry out work and mission.

Total Nonoperating Activities 458,958

Change in Present Value of Annuities Payable

657,456

(198,498)

12,388,189

Foundation Staff

Office Administrator

Facilities and Real Estate

Donor Consultant

Church Consultant

Accountant

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Board of Directors

and Committee Assignments

Alletto, Elizabeth - Upton, MA - Executive - Treasurer, Budget and Audit

Bickerton, Bishop Thomas - Methuen, MA - Executive

Brown, Rev. Dr. Adama - Cumberland, RI - Grants Ministry

Carlone, Dennis - Cambridge, MA - Grants Ministry, Wesley Development Advisory Board

Carpenter, Pamela - Manchester, CT - Executive - Chair, Investment

Choi, Rev. Jinyong - Andover, MA - Grants Ministry - Chair

Condon, John - Acton, MA - Executive, Investment

Crass, Rev. Theodore F. - Lowell, MA - Foundation President, Executive

DiManna, Pastor Dawn - Fremont, NH - *Loan*

Gardner, Pastor Crystal - Randolph, MA - Justice in Our Time (JIOT)

Hoch, Pastor Bill - Newton, MA - Grants Ministry, Personnel and Nominations

Hornung-Marcy, Rev. Kimberly - Williston, VT

Mueller, Joy - West Dennis, MA - Grants Ministry, Personnel and Nominations

Owen, Kristine - Northborough, MA - Executive, Personnel and Nominations

Phillips, Dorothy J., PhD - Natick, MA - Executive - Interim Secretary

Randlett, Kirk - Brookline, NH - Loan, Wesley Development Advisory Board

Santos-Perez, Rev. Wanda - Falmouth, MA

Savick, Rev. Lourey - Boston, MA

Stayton, Alan B. - Sudbury, MA - Investment - Co-Chair

Stephen, James D. - Ayer, MA - Executive, Budget and Audit, Grants Ministry, JIOT - Chair

Vemula, Michael - Wayland, MA - Budget and Audit

Wobby, Lauren - Northfield, VT - *Executive, Investment, Budget and Audit*





Your Ministry Partner.

For more than twenty-five years, the United Methodist Foundation of New England has served churches, agencies, clergy, and individuals within the New England Conference.





