



DAKOTAS UNITED METHODIST FOUNDATION

"Multiplying Your Gifts for the Kingdom of God."

DAKOTAS UNITED METHODIST FOUNDATION MISSION STATEMENT

The mission of the Dakotas United Methodist Foundation is to build relationships that encourage giving to the Foundation to provide educational and financial resources to individuals, ministries, and churches affiliated with the Dakotas Annual Conference to further the Kingdom of God.

2014

ANNUAL REPORT

A Word from our Director

As I began my position as the new director of the Dakotas United Methodist Foundation, a new chapter of my life was about to begin. This opportunity came with a host of emotions - but excitement and faith rose to the top each time I thought about my upcoming responsibilities.



It's my faith in God and the presence of the Holy Spirit that gives me pleasure every morning as I begin my workday. Each day I see opportunities of how the Foundation is able to work together with clergy, laity, and the entire Conference staff to help our churches throughout the Conference become more vital. We are doing this in these ways:

DEVELOPING MISSIONAL LEADERS

through Seminary Scholarships assisting clergy to implement a plan to grow continually in leadership and discipleship abilities; Nurturing our young people through camping and leadership groups;

EQUIPPING MISSIONAL CONGREGATIONS

through Ministry Development Grants which



Spirit Lake Ministry

have assisted in equipping lay leaders to provide leadership and ministry in their local congregations, connecting unchurched people with outreach programs, and providing electronic outreach to those unable to connect on a weekly basis;

EXTENDING MISSIONAL IMPACT

by supporting Dakotas missions – Tree of Life, Spirit Lake Ministry, Hope Center, Open Door, Haiti Solar Oven, and Bakken Oil Rush Ministry;

GENERATING MISSIONAL RESOURCES

through congregational stewardship training, endowment consultation, and investment support.

I could not be more excited to continue my ministry with the Foundation as we build financial programs, help churches to invest wisely, be good stewards of God's resources and continue our work of making disciples of Jesus Christ for the transformation of the world.

Sheri Meister,
Executive Director

Scholarships

Ministerial Student Aid

Lucas Boomsma \$12,000.00

Boston University

Julian and Lois Wigen Endowment
Glen Ista Endowment

Dan Fuchs \$12,000.00

Asbury Theological Seminary

Coe and Dorothy Frankhauser Foundation
Wesley Center of Religion

Alyssa Quade \$7,000.00

Asbury Theological Seminary

Bishop Michael Coyner Ministerial Education
Wesley Center of Religion

Seth LaBounty \$7,000.00

Asbury Theological Seminary

J. Carleton and Pauline Green Foundation
Wesley Center of Religion

Valerie Hummel \$7,000.00

Garret Evangelical

Leona E. Hanson Endowment
Wesley Center of Religion

Autumn Krueger \$7,000.00

Chandler School of Theology

Leona E. Hanson Endowment
Glen Ista Endowment
Ted and Toni Martin Endowment

Joddy Meidinger \$6,000.00

Asbury Theological Seminary

Vernon Wendlandt Endowment
Ralph and Lenora Cushing Endowment
Joel C. Harris Endowment

Martin Avery \$6,000.00

Illiff School of Theology

Glen Ista Endowment
Wesley Center of Religion
Miranda United Methodist Church

Jeff Lathrop \$4000.00

Sioux Falls Seminary

Vernon Wendlant Endowment



Grants

Bremer Mission Matching Grants

- Sioux Falls Wesley UMC, Sioux Falls, SD – mid-week children’s programming.
- Spearfish UMC, Spearfish, SD – trip to UMCOR Depot, Baldwin, LA.
- Aberdeen 1st UMC, Aberdeen, SD – “Sewing Seeds” ministry for sewing projects for missions.
- Jamestown 1st UMC, Jamestown, ND – outreach ministry to middle school students.
- Fusion UMC, Mitchell, SD – mission trip to Juarez, Mexico to build houses.
- White UMC, White, SD – Deubrook Backpack Project, weekend meals for children.
- Stickney UMC, Stickney, SD – supporting ministry on the Pine Ridge Reservation.
- Asbury UMC, Sioux Falls, SD – “Kids Against Hunger” meal packing program.
- Presbyterian-UMC, Ellendale, ND – mission trip to Chicago to work in homeless shelters.
- Canyon Lake UMC, Rapid City, SD – mission trip to Seattle to serve homeless and refugees.
- McCabe UMC, Bismarck, ND – raising funds in support of Haiti Solar Oven Project.
- Beresford UMC, Beresford, SD – mission trip for the church.
- Plankinton UMC, Plankinton, SD – work team to Storm Mountain Camp to clear storm debris.
- Steele UMC, Steele, ND – youth trip to Spirit Lake Ministry Center.
- Central UMC, Milbank, SD – weekend backpack/meal program.
- Pierre UMC, Pierre, SD – Nourish Body & Soul program.

(\$500 grants, unless noted)

Ministry Development Matching Grants

- Garden City UMC – to transition to lay-led worship sermons delivered electronically. \$500
- Beresford Zion UMC – Mugging Ministry for follow up on new visitors. \$1000
- Sioux Falls Wesley UMC – Wesley Neighborhood Outreach. \$1000
- Washburn UMC – Blankets, Winter Coats and Towels for the Bakken Oil Rush Ministry. \$1000
- Spearfish UMC –New Worship Service, The Well. \$1000
- Fargo First UMC: The Gathering worship service. \$1000
- Legacy UMC – Orchard/Prayer Path. \$1000
- Lake Preston UMC – Salt & Pepper Young Adult Ministry. \$1000
- Alexandria UMC – Audio Visual Equipment to Enhance Worship. \$500



\$8000

IN GRANTS WERE MADE
AVAILABLE THROUGH THE ERMA
HOUSE ENDOWMENT AND YOUR
UNDESIGNATED GIFTS!

Donors

\$10,000 or More

Scott & Julia Jones
 Maynard Klingbeil
 G. Verne & Donna Luke
 Norma Peltier
 Lucille Roduner
 Walter Sizer
 Ernie Slagg
 Kay Werremeyer

\$5,000 - \$9,999

Mike & Kari Goos
 Roger & Linda Sandness
 Muriel Simmons
 Lou Weckerly

\$2,500 - \$4,999

Mark & Judy Dorsett
 Ben Griffith
 Marjorie Haskins
 David & Marilyn Holzwarth
 Grace Huck
 Randy & Sue Roemmich

\$1,000 - \$2,499

Boyd & Evelyn Blumer
 Norma Cameron
 Elizabeth Campbell
 Roy & Lazann Caudill
 Kevin Christianson
 Richard & Sharon Cutler
 Tom & Becky Dravland
 Dick & Donna Fisher
 Rodney & Doris Gist
 Max & Jeanne Gonzenbach
 Tim & Jean Graf
 Janelle Jones
 Todd & Karin Loomer
 Annetta Nies
 Bishop Bruce R & Char Ough
 James & Mavis Pomeroy

Janice Sweers
 Julian & Lois Wigen
 Jim & Barbara Williams

\$500 - \$999

Marvin Eldridge
 Barb Goodman
 Stephanie Gottschalk
 Howard & Karen Grinager
 Ron & Becky Holten
 Ron Laqua
 Arden Lowery
 Randy & Sheri Meister
 Wayne & Coleen Reiser
 Thomas Sorensen
 Robert Stoner
 Rebecca & Steve Trefz
 Nancy & Mark Wahlstrom
 Karin Wentz
 Tom Wentz
 Bob & Barb Wilkens

\$250 - \$499

Mary Balson
 Robert & Linda Chilson
 Virginia Dettman (Foundation)
 Charles & Darlene Finney
 William & Karin Fitzgerald
 Duncan Flann
 Robert & JaNell Gnirk
 John & Connie Howard
 Darin & Ann Johnson
 Wayne & Rhonda Kruger
 Dorothy Lindbloom
 Linda Mickelson Graham
 Janet Miller
 David Mitchell
 Brad & Sheryl Myers
 Vern & Juanita Neff
 Tom & Jennifer Ortman
 Kenneth Oswald

Charles & Deanna Springer
 Allen & Mavis Stearns
 Lanny & Linda Wade

\$100 - \$249

Louella Anderson
 David & Dorothy Andrews
 John Baird
 Robert & Joann Barden
 Alan & Paleene Bergman
 John & Debbie Billion
 Doug & Marcine Bird
 Don Bradley
 Roberta Brennan
 Dinus & June Briggs
 Mark & Joni Britton
 Rodney & Linda Buck
 Jeanine Carpenter
 Lloyd & Carol Carson
 Gary & Rosemary Chappell
 William & Pat Coffield
 Kermit & Sue Culver
 Emil & Penny Eberhart
 Ernie & Luann Edwards
 Lois Emery
 Dorothy Erhart
 Dennis & Jane Evenson
 John & Ruth Ewing
 Sheri & Dale Fadley
 Wayne Fischer
 Delores Ford
 Myron & Bonnie Fuerst
 Sean & Diana Galloway
 Rick & Paula Gordon
 Anne & Dalen Green
 Eric & Ruth Grinager
 David & Janice Grow
 Ken & Mary Alice Halverson
 David & Jerilyn Hansen
 Floyd & Jill Hansmeier
 John & Judy Hey
 Doris Hofer
 Harvey & Theone Holzwarth

Donors (continued)

Bob & Deanne Horne
 Ruth Hottmann
 Rich & Jane Howard
 Gail Johannsen-Bridge
 Don & Darla Kachelhoffer
 Deborah & George Kuhler
 Karla Leach
 Herbert & Cherry Lippert
 Jim Loomer
 Romaine & Carol Luckhurst
 Elsie McBride
 Patrice Meier
 Katherine Moen
 Martha Moore
 Robert & Bonnie Neff
 John & Elizabeth Nelson
 Keith & Nancy Nelson
 Dale & Roberta Nesheim
 Russell & Wanda Olson
 Oliver & Norma Oswald

Stephen & Marilyn Perry
 Carol Pollard
 Jeff & Betty Pospisil
 Kari Priewe
 Marilyn Rahn
 Sherman Rausch
 Mary Jane Rea
 Ross & Valerie Reinhiller
 David & Eleanor Richards
 Gerald & Anna Rix
 Roger & Pam Rix
 Beverly Sawinsky
 Howard & Luella Schlobohm
 DeVern & Joan Schwenn
 David & Becky Scott
 Loren & Mary Scott
 Guy Sederski
 Gary & Yvonne Smith
 Roger & Joan Spahr
 James & JoAnn Sperry

Leo Spinar
 Marilyn Spurrell
 Ka & Sally Squire Jr.
 Jerome Stiegelmeier
 Wayne & Betty Testerman
 Robert & Myrn Therkildsen
 Gloria Faye Truman
 Dick & Patricia Unkenholz
 Irene Weiland
 Catharine Whitehead
 Evelyn Whitney
 Albert Yocom

Ministries & Institutions

Agar United Methodist Church
 Arlington United Methodist Church
 Canistota United Womens Society
 Dickinson United Methodist Church

Groton United Methodist Church
 Holmes United Methodist Church
 Lake Poinsett Camp
 Lake Preston United UMC/UCC
 Milbank Central United Methodist Church

Rapid City Canyon Lake United Methodist Church
 Spearfish United Methodist Church
 Storm Mountain Retreat Center
 Tree of Life Ministry
 Yankton United Methodist Church

Gifts

In Honor or in Memory

In Honor of Emil & Penny Eberhart

From: Roger & Linda Sandness

For: Lake Poinsett

In Memory of Betty Jo Eldridge

From: Marvin Eldridge

For: Seeds of Faith Wesley Acres

In Memory of Betty Jo & Marvin Eldridge

From: Dick & Patricia Unkenholz

For: Pensions Endowment

In Memory of Trig Hall

From: Beverly Cain, Lydia Hall, & Bonnie Hall

For: Undesignated Funds

In Memory of Sallie Meier

From: Dick & Patricia Unkenholz

For: Pensions Endowment

In Memory of Archie Millard

From: Cora Jean Millard

For: DUMF Operations

In Memory of Janet Wentz,

Donald, Jeffery, Robert Neff Family

From: Karin Wentz

For: Marth Neff Endowment

In Memory of Janet Wentz,

Donald, Jeffery, Robert Neff Family

From: Tom Wentz

For: Martha Neff Endowment

In Memory of Janet Wentz,

Donald, Jeffery, Robert Neff Family

From: Robert & Bonnie Neff

For: Martha Neff Endowment

In Memory of Emerald Peters

From: Marilyn Peters

For: DUMF Operations

In Memory of Vernon Reinhiller

From: Ross & Valerie Reinhiller

For: Asbury Seminary Scholarships

In Memory of Lola Schott

From: DeVern & Joan Schwenn

For: Asbury Seminary Scholarships

In Memory of Lola Schott

From: Dick & Patricia Unkenholz

For: Pensions Endowment

In Honor of Dr Rebecca Swanson

From: Jerome & Dinae Swanson

For: DWU Scholarships

In Memory of Richard Teichmann family

From: Joan Teichmann

For: DUMF Operations

In Memory of Frank & Evelyn Whitney

From: John & Connie Howard

For: Fred & Evelyn Whitney Endowment



In the summer of 2014 the Board of Directors voted to move our portfolio to Wespath Investment Management Services.

Wespath is an established investment management organization with approximately \$21 billion in assets under management. Their mission is to help us meet our investment objectives while honoring the Social Principles of the denomination.

They serve the needs of institutional investors through a multi-manager platform of broadly

diversified funds, positive social purpose lending, and the integration of environmental, social and governance (ESG) considerations into their investment strategy.

The Wespath approach includes:

- Investment portfolios providing exposure to a broad range of investment strategies
- Timely, transparent reporting
- An efficient operational cost structure
- Full range of bundled services: including custody services, ESG and advocacy services

Endowments

Unrestricted endowment gifts invested in the Foundation are to ministry as retirement investments are to individuals. Endowment gifts are never spent; the gift remains intact and only the interest income resulting from wise and prudent management by the Foundation is available for ministry. When donors (individuals and churches) place their assets with the Foundation, they can be sure they are ultimately investing in the Kingdom of God.

Endowment gifts may be restricted for a special purpose or unrestricted. They may be given in honor or remembrance of a loved one. There are many ways to fund an endowment including outright gifts, gifts of stock or other appreciated assets and more. Contact the Dakotas United Methodist Foundation to talk about your financial and ministry goals.

How does an endowment work?

Imagine your church received a bequest of \$100,000 in 2004 where the earnings are to be used to provide college scholarships. Many churches would invest the \$100,000 in CD's and use the interest for scholarships. Other churches would invest the \$100,000 in an endowment where the funds are invested responsibly with Wespath and 4.5% of the average balance will be used for scholarships. The graph below shows historical data to compare the two options. If your church chose CD's, the fund would still be at \$100,000 but the scholarship would have decreased to about \$500/year. If your church chose an endowment, the fund would be at over \$120,000 and the scholarships would be over \$5,000/year.

A LOOK AT THE NUMBERS

Total assets under management

\$18,503,762

Distributions for Ministry

Scholarships: \$68,000

Grants: \$16,250

Endowments: \$ 229,791

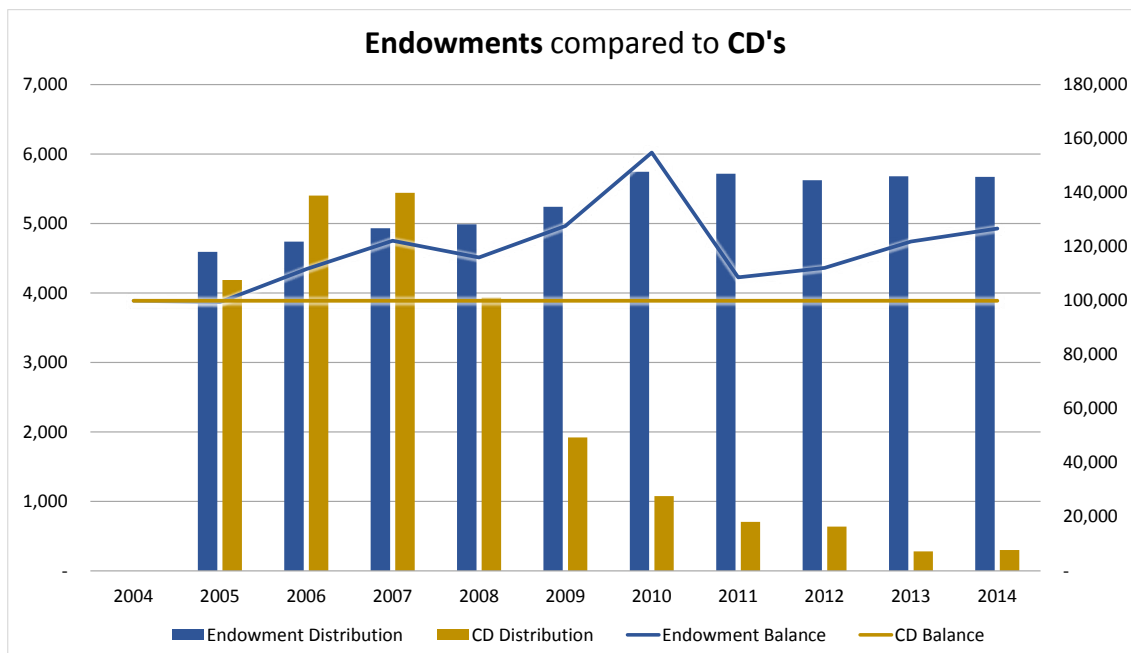
New Accounts

1 New Investments and 4 New Endowments

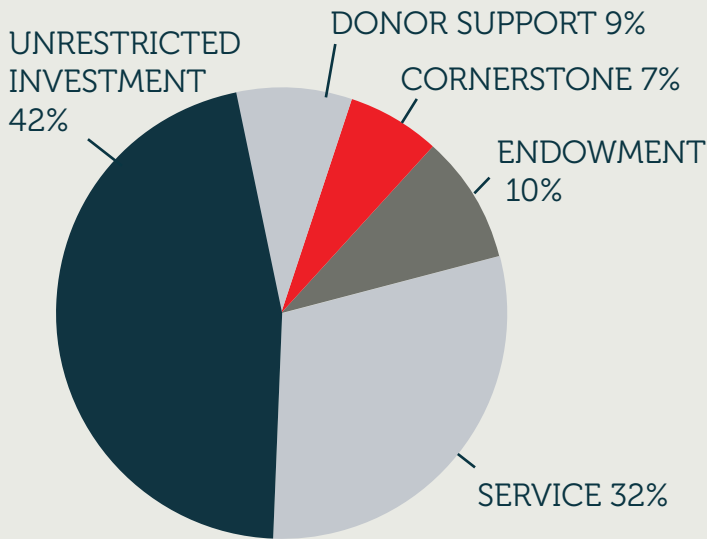
Totalling \$64,298

Charitable Gift Annuities

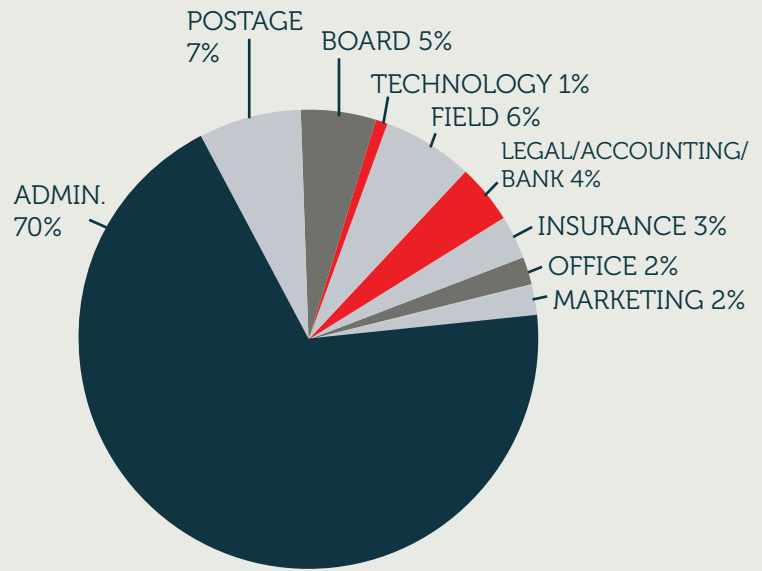
Totalling: \$140,000



2014 FOUNDATION INCOME



2014 FOUNDATION EXPENSES



BOARD OF DIRECTORS

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- Rev. Howard Grinager
Vice-President
- Kay Werremeyer
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- Jeff Pospisil
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THANK YOU
FOR YOUR SUPPORT IN 2014!



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FOUNDATION

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