



**KANSAS
METHODIST**
FOUNDATION

2021 IMPACT REPORT

Ministry Grows Here

Our Vision

To empower faithful people, churches, and organizations to imagine the possibilities for ministry, then turn them into reality.



Message from our President

Grace and Peace to you in the name of Jesus Christ, the Resurrection and the Life.

In 2021, we worked to clarify our strengths, the unique benefits we provide, and how we believe God is calling us to help grow ministry. We believe God is calling us to dream dreams and see visions, knowing that we have an abundance of resources poised for ministry. When we activate our treasures with a generous heart, God will grow us and use us to make disciples of Jesus Christ, change lives, and transform communities throughout Kansas. Thank you for being a part of what God is doing.

One result of our efforts was to change our name to the Kansas Methodist Foundation, reflecting our larger scope of ministry. KMF is pleased to serve churches, organizations, and families connected to the United Methodist Church, the Global Methodist Church, and more broadly within the Methodist movement. KMF's interest is serving Kansas Methodists to make a lasting impact and is a separate 501(c)(3). Our fiduciary duty is to our churches, organizations, and families so that you can thrive and do the ministry to which God is calling you.

Through feedback from our faithful partners, we created a strategic plan with intentional efforts to grow in three key areas: legacy giving of generous Methodists, socially responsible investments for churches and organizations, and leadership development.

Our legacy giving ministry grew through hiring a Chief Development Officer, Tyler Curtis. Tyler has a unique gift to help people discover how their resources can make a lasting impact on the church and other ministries important to them. We are entrusted with the resources in our lives by God, and I believe God is calling us to be responsible stewards as we deploy these resources both in life and in our estate planning. If we can help you make a difference with what God has entrusted to you, please let us know.

The leadership development program grew by offering a new Clergy Financial Wellness Initiative. Through the initiative, we invested in the financial health of Kansas clergy and churches by providing education in personal and church finance.

Finally, I am pleased that we grew significantly in our partnerships with churches, institutions, and generous Methodists across the state. The resources we steward for ministry grew by over \$14.8 million. This is a 24% growth of assets, not including market gains. Thank you to our partnering entities and families for your trust and the opportunity to serve you.

All of this ministry comes from a great expectation that God is with us, and God will provide for what we need to do the ministry to which we are each called. Thank you for partnering with us and for what God is doing together through us. May the Lord bless you, lead you, and strengthen you for faithful service in the coming year.

Sincerely,

Rev. Dr. Dustin D. Petz
President and CEO



Helping Grow Estate Planning

Schultes Update Estate Plan to Give Charitably and Protect Family

Because they were raised in the church and it is in their hearts to follow God's word, Steve and Teresa Schulte believe giving charitably is something they are called to do. While recently helping to settle her uncle's estate, they saw the need to revisit their own plans for the future to ensure their charitable desires would be met and they would take care of their family.

"We wanted to have a plan for our kids and our grandchildren that would persevere," Teresa said. "We also wanted to give to our church, the Methodist church, as well as some other organizations near and dear to our hearts. When we initially set up our trust documents in 1999, it was in essence an 'in case of emergency plan' to protect our children should something happen to both of us."

However, as they reflected on the plan they previously created, they knew that due to changes in life, such as now having grandchildren and their increased ability to give charitably, their estate plan no longer reflected their current desires.

Through a conversation with Kansas Methodist Foundation President Dustin Petz following his presentation at Stilwell United Methodist Church, Steve and Teresa became aware of the estate planning and charitable giving services provided by the Foundation.

"It's like a community foundation, but it has the Wesleyan tie to it; it just made sense," Steve said. "With the help of John Griffin, an estate planning attorney with Stewardship Counseling, LLC, whose service is provided by the Foundation, I thought, 'This is too good to be true' and we absolutely wanted to take advantage of it."

With the assistance of John, Steve and Teresa worked on a complete restatement of their trust.

"Estate plans are very personal, and John took a lot of time to listen and educate us to help clarify what we really wanted," Steve said.

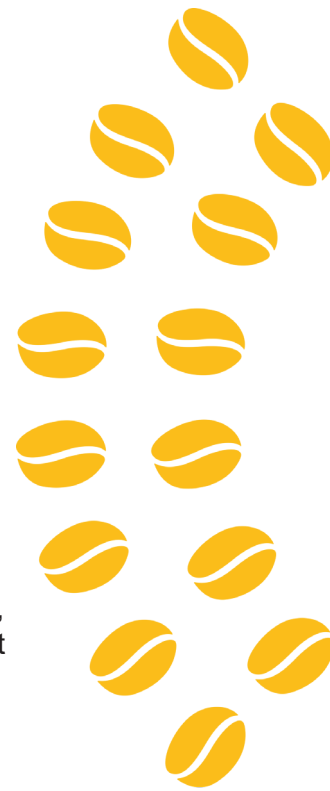
"It was definitely not just a template, which I feel like we might have gotten had we gone directly to the attorney," Teresa said. "I think the nuances he helped us get into our document were very important to both of us."

In the restatement, it was important to the Schultes to include a charitable giving component as well as to create a special trust that will provide for their children and grandchildren.

"We chose to give ten percent to the Foundation for charitable purposes," Steve said. "We also felt like it was important that our children have some say in that charitable giving. It's nice that we can pass along generationally the charitable idea of being benevolent."

Because of the way the Foundation has established the legacy gifting program, their children will be able to direct a portion of the charitable asset throughout their lifetimes. The Schultes appreciate the flexibility the Kansas Methodist Foundation provides for their charitable giving during their lifetime and into perpetuity. Since the gift to the Foundation is named in their estate plan, they have the latitude to change the charitable recipients of their fund at the Foundation without going back to their attorney and updating their documents.

"I would much more likely give my money to the Foundation because I believe they will be good and faithful stewards of our gift lasting into perpetuity," Steve said.



What's Your Plan?

It is estimated that 60% of Americans have no estate plan. Whether you need to create your plan for the first time or update the documents previously created, we can help.

The Kansas Methodist Foundation offers FREE estate planning services. One service is through a partnership with John Griffin, Esq. of Stewardship Counseling, LLC. John helps you create the draft plan to take 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.

Contact us at info@kansasmethodistfoundation.org or 620-664-9623 to schedule your meeting today!



Helping Grow Charitable Giving

Eby Family Gives Generously through their Donor Advised Fund

Inspired by the generosity of their family and looking for a way to give charitably, Charles and Jean Eby chose the Kansas Methodist Foundation to care for their donor advised fund.

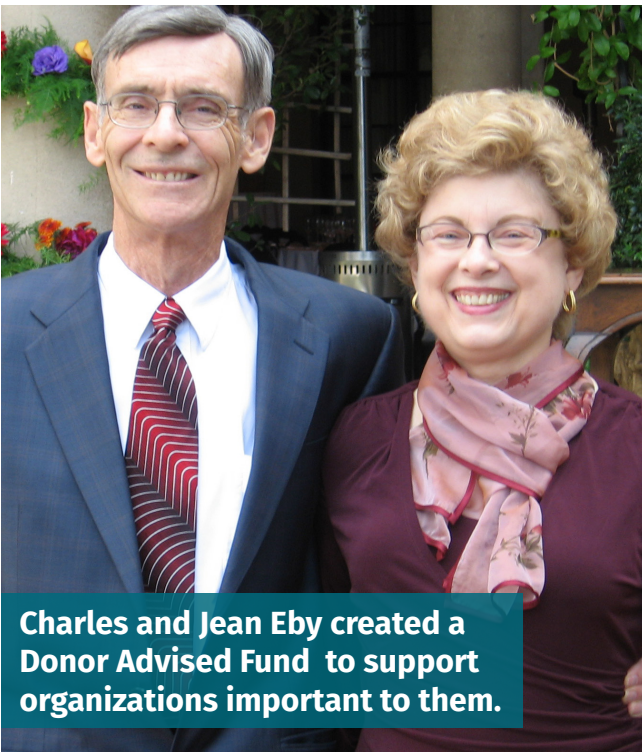
Charlie looked for options to steward their giving and was aware of the local community foundation when he learned about the Kansas Methodist Foundation.

“I did a little vetting and I just felt more comfortable with the Methodist foundation,” Charlie said. “I thought it was well run and it would do what I wanted to accomplish through giving. I’m a Methodist so it is really comfortable to be doing it this way.”

To accomplish their charitable giving goals, Charlie and Jean use a donor advised fund. Charlie views this fund like a charitable bank account that supports the organizations he desires to impact through their giving. When Charlie is ready to support his church, Wichita First United Methodist Church, or another nonprofit, he makes a recommendation to KMF to make a gift from the fund. Upon approval, the gift is sent to the designated organization in their name.

“The donor advised fund allows us to do what we wanted to do in the first place,” Charlie said. “It’s not limited to only Methodist organizations...and it was important to me it not be limited only to the church. Certainly we give a large portion to the church, but it does go to other organizations that I believe are doing good work.”

Although a regular supporter of his church, Charlie is also passionate about many ministries and organizations. He loves Habitat for Humanity, has been involved with the United Methodist Open Door for a long time, and, as a former big brother, he desires to support Big Brothers and Big Sisters.



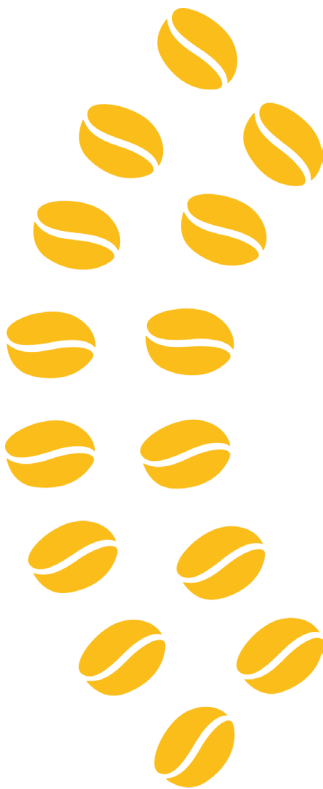
Charles and Jean Eby created a Donor Advised Fund to support organizations important to them.

Another advantage Charlie appreciates about his donor advised fund is the ability to keep his giving consistent each year. To fund his charitable giving, Charlie donates appreciated stock to KMF to be sold and the proceeds placed in his donor advised fund.

“In years things are good, we can put more into the account,” Charlie said. “When it’s not seven fat cows and we get seven skinny cows, we don’t put as much in. We’ve kept a reservoir of cash that allows us to try to keep a consistent gift to people like the church. The church is going to need the money every year so if we can keep our giving relatively the same it’s more predictable and makes life easier for the organizations.”

Through their generosity, Charlie and Jean make an impact for their church and numerous other organizations each year.

“I just feel like when you’ve been blessed, you should pass it on,” Charlie said. “We have been blessed so I really want to give.”



“We are extremely grateful to Jean and Charles Eby for their generosity to Open Door over the years. Above their generosity of funding, Charles has given countless hours serving on the Board of Directors, volunteering at the Community Food Ministry, and the Resource and Referral Center wouldn’t have been built if he hadn’t provided his construction talents day in and day out. We are so very appreciative of the impact the Eby’s have had in the life of Open Door on behalf of the many who receive assistance through its programs.”

- Deann Smith
Executive Director, UM Open Door



Donor Advised Fund

A Donor Advised Fund enables you to make a greater impact with your giving. Once established, a Donor Advised Fund becomes a giving fund to support your church and other charitable causes. The fund is managed by KMF and you advise on where, when, and how the funds are distributed.

Gifts from a Donor Advised Fund can support your church, seminary scholarships, KMF ministry grants, or any 501(c)(3) organization.

Helping Grow Church Resources

Endowment Program Funds Upgrades for Hybrid Worship Service

When the pandemic started, members of Council Grove Dunlap UMC were not strangers to live streaming worship. However, when they resumed worship in person, they found new technology was needed to provide the in person and online experiences they desired.

The church's streaming worship service started with humble beginnings in 2019. A member of the congregation had a procedure that required him to be hospitalized for several months. Since he wanted to continue engaging in the weekly service, the congregation began using a cell phone and a tripod on Facebook Live.

When the pandemic closed the church building, the congregation was familiar with live streaming and made quick adjustments.

"It wasn't a leap for us at all to continue our live stream worship service when they shut down buildings," Rev. Brenda Davids, pastor of Council Grove Dunlap UMC said. "It was a bit of a leap to get it more intimate."

Throughout the pandemic, they got better at providing a streaming option where viewers felt a part of the service. However, when the building reopened, the camera person moving around became a distraction to those worshipping in person.

"We wanted to provide a hybrid worship service - continuing to worship with our online congregation," Brenda said. "We have a pretty large following online now."

As one of the only United Methodist Churches in their area to offer a live stream worship service option, Council Grove found a niche broadcasting its weekly service. Although it is hard to estimate exactly how many people participate online, after the live stream is ended the Facebook recording receives numerous views throughout the week.

The congregation looked at options to provide an intimate worship experience in person and online and found a video solution with MSM Systems in Lawrence. There was only one hurdle.

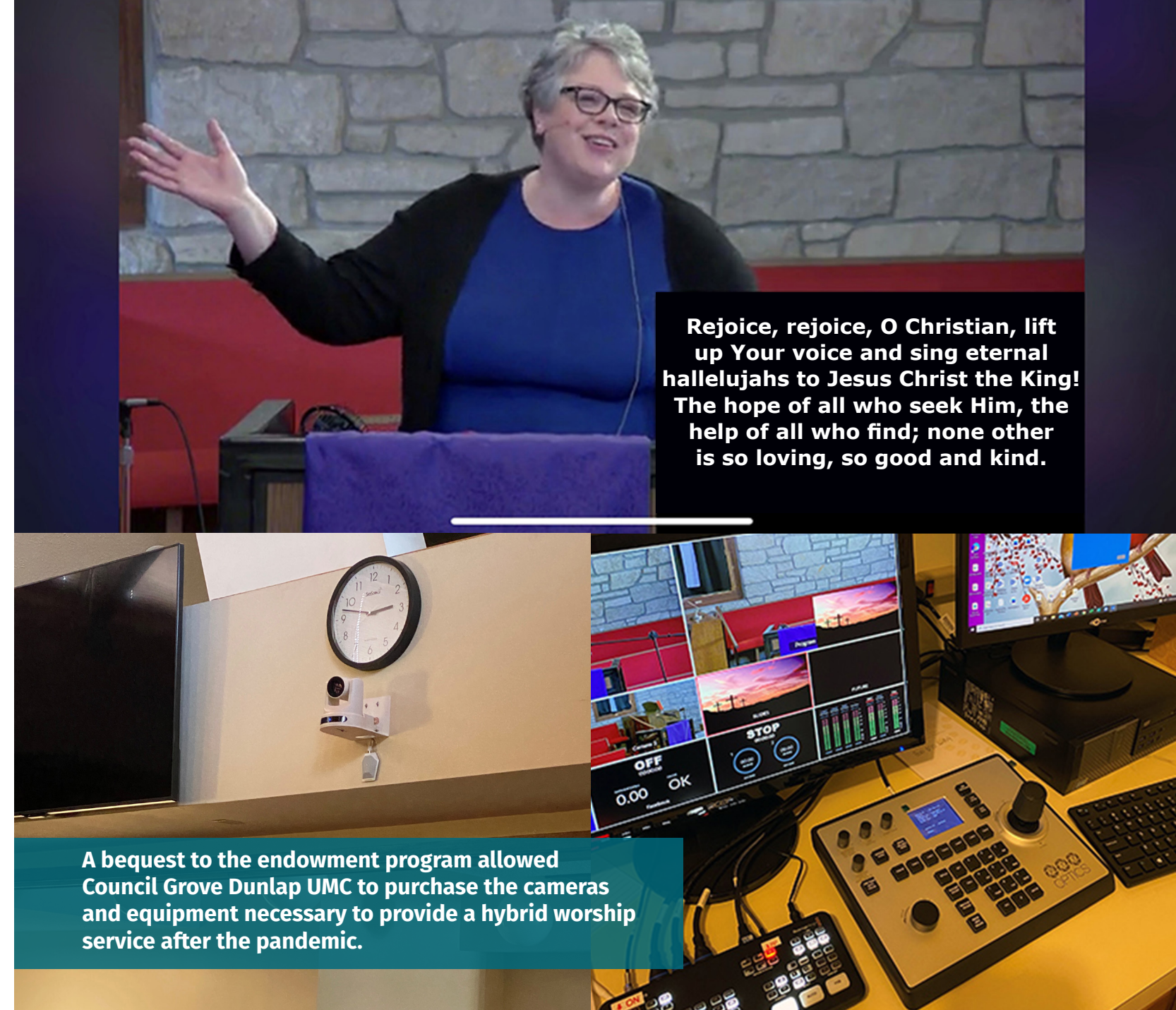
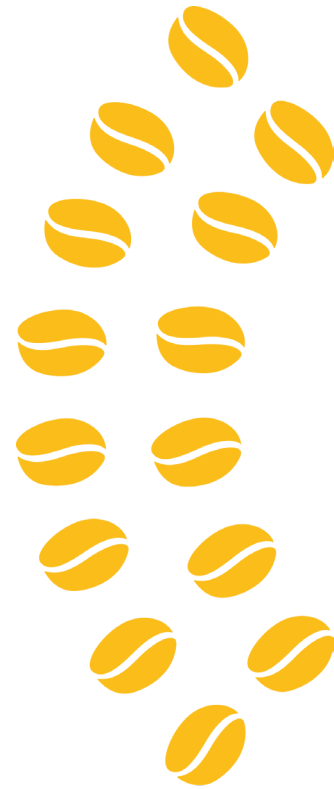
"It was more money than we were expecting," Brenda said. "We've had zero investment in this. We were using our own phones and Facebook Live is free so we had no bank to do this project.... We had to come up with some money and that's where we leaned back into our investments with the Foundation."

Before an online service was on their minds, the finance committee chair had a dream of starting an endowment program. The congregation worked to start an endowment and opened investment funds with KMF.

"When we got the endowment started, I don't think we even had \$1,000," Brenda said. "It really didn't have anything, but what was important was starting it."

Congregation members could now leave an estate gift to the endowment fund to be used at a future date.

Through the endowment program and the faithfulness of congregation members to give, the church had immediate availability of funds to upgrade the cameras for the online service. Through these gifts, their legacy will live on in the church and community in a way they would probably never have imagined.



Invest with KMF

Churches and organizations who invest through the Kansas Methodist Foundation have access to socially responsible funds which align with our Methodist values. KMF offers the flexibility to choose investment options based on the desired returns and the time line of when the funds will be needed.

Through a managed fund, the church or organization maintains full control of the investment and determines the asset allocation and spending policy. Another option is to gift the investment to KMF to create a permanent fund. In a permanent fund, KMF stewards the investment and distributes funds based on KMF's spending policy.

Helping Grow New Ministries

Augusta First UMC Starts New Community Karate Ministry

There are a lot of ways we might think of to bring people closer to Jesus Christ. Teaching them karate may not be at the top of that list. Nonetheless, First United Methodist Church in Augusta saw an opportunity for discipleship in karate. With the help of a Pathways for Discipleship grant, the church has been coming into contact with children and youth who are developing a passion for that discipline.

Like many other smaller communities, Augusta has been hit hard by COVID. A number of athletic programs for children and youth quit functioning and are now trying to re-start. The virus also hit many families hard economically, and the fees associated with some other children and youth programs were difficult for them to support.

"I believe that karate can be a good fit for us in forging new relationships with a variety of people in the community."

- Rev. Lynn Lamberty

While others saw only problems, Derek Highbarger, a long-time member of the Augusta Department of Public Safety who holds a black belt in karate, saw opportunity. He has worked with kids for a long time and has three children of his own. He knew from previous experience that there was interest in karate in Augusta. As an active member of Augusta First UMC, Derek was aware that the church was always open to non-traditional ministry with young people. What he needed was resources to purchase the mats the ministry would need. Though the church was experiencing a COVID-strapped financial year, it found some money that could be used as a match for a \$500 Pathways for Discipleship grant. When the mats arrived, Derek started the class.

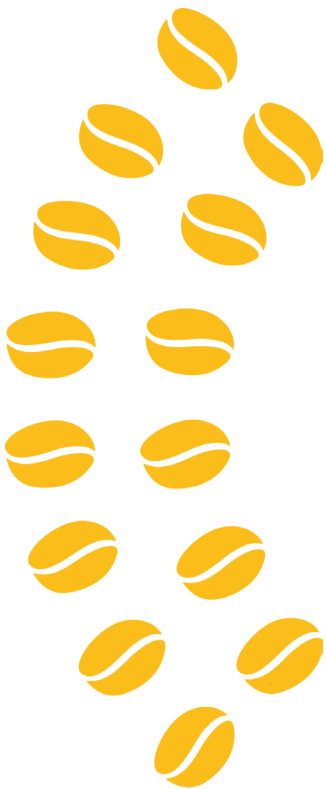
Derek, with the help of his children and additional adult leadership, has been holding the karate class in the church gym since November of 2021. There are 10 to 15 children and youth ranging in age from four to sixteen who meet on Thursday nights and more are showing interest. Their parents bring them and often stay to watch the training. Some of the older youth recently asked for a second session with Derek during the week to increase their training and he managed to work it in. All of this is free to the participants.

Rev. Lynn Lamberty, pastor of First UMC Augusta, is excited about the future of this ministry.

"I believe that karate can be a good fit for us in forging new relationships with a variety of people in the community," Lynn said. "They are experiencing the church in a new and exciting way and have appreciated the welcome they have received. At the heart of the training for karate are values also useful to Christians: self-discipline, respect for others, self-confidence, support for family and being willing to develop one's given talents and abilities well for the blessing of others. This ministry opportunity would not have developed into anything concrete without the support of the Kansas Methodist Foundation."

The program will continue as long as students keep showing up. God is moving in interesting ways.

- Courtesy of Augusta First United Methodist Church



With the support of a Pathways for Discipleship grant, Augusta First UMC started a karate ministry for children in their community.

Pathways for Discipleship Grants

Pathways for Discipleship Grants support new, innovative ministries across Kansas in the areas of Children and Youth Programs, Ministry and Outreach, and Leadership Education. These grants are not possible without your support! Thank you to the many families who support the grant ministry through annual and estate gifts.

2021 Grant Recipients

Atwood UMC	Iola Wesley UMC	Quenemo UMC
Augusta First UMC	Kechi UMC	Salina Church of the Cross UMC
Basehor UMC	Larned UMC	Salina Trinity UMC
Burden UMC	Lyndon UMC	Sedan UMC
Café Quetzal	Moran UMC	Wichita Chapel Hill UMC
Camp Chippewa	Osawatomie First UMC	Wichita Heart of Christ UMC
Caney UMC	Paradise UMC	
Fairway Old Mission UMC	Pretty Prairie UMC	

Helping Grow Future Clergy

Pass the Torch Scholarship Impacts Next Generation of Clergy

With aspirations of serving every seminary student in the Great Plains Conference, the Pass the Torch committee stepped closer to their goal through the growth of the scholarship fund.

Since its founding, the Pass the Torch Scholarship has provided more than \$100,000 to help seminary students answer their call. Through generous gifts and memorial funds, in 2021 alone the scholarship endowment fund grew by over \$14,000.

“It’s an effort on the part of retired clergy and surviving spouses to address the needs of people wanting to answer God’s call to ministry in the church, but for whom the cost of that was prohibitive,” Pass the Torch Committee Chair Rev. Gary Beach said.

Started in the 1990s by retired pastors and surviving spouses of the Kansas West Conference, the Pass the Torch Scholarship has since expanded to serve the Great Plains Conference and provide financial support to the next generation of clergy.

“When obeying God’s call and making plans to attend seminary, I had to have faith that God would provide,” scholarship recipient Brenda Hogan said. “The cost of seminary is daunting. While still ‘dreaming’ of going to seminary, I learned about the Pass the Torch scholarship from my pastor at the time, Mark Conard. I filed it away as future help with school expenses. It was an early step in believing in the possibility of this new chapter in life. I was blessed to receive scholarship funds that have been a great help to me in furthering my education.”

For the students receiving the scholarship, it not only helps provide financially, but also provides encouragement in the seminary journey.

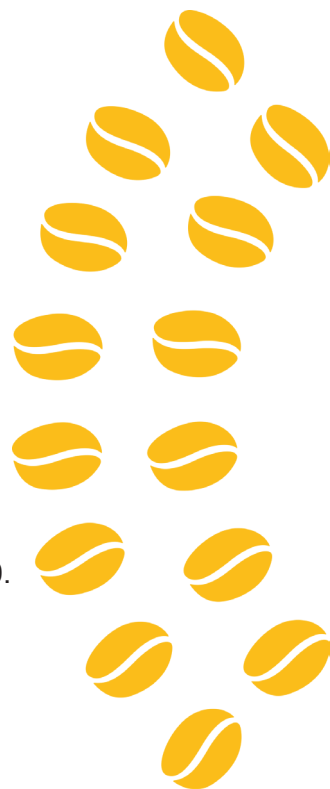
“While the Pass the Torch scholarship only covers a small percentage of the annual cost of seminary, the impact is far greater,” Victor Peterson, a scholarship recipient said. “It warms my heart to know that former pastors and spouses are willing to invest in the future of the church and specifically help fund young pastors, like me, in training. Most retiring pastors are not wealthy, and there are numerous causes I’m sure they feel called to help fund. So their generosity toward me and my call both affirms my call and makes me feel valued and appreciated. Being in seminary and ministry simultaneously can be challenging and exhausting at times, but their gifts encourage me to continue pushing through.”

Brenda and Victor are just two of many scholarship recipients impacted by the generosity of past and current retired clergy and spouses.

As seminary costs continue to rise, the committee is hopeful it will be able to provide a greater impact through increasing the number of scholarships awarded and the dollar amount.

“The cost of seminary is far in excess of what we retired clergy would ever have had to pay for a seminary experience,” Gary said. “The retired clergy want to continue to beef up what we are able to do.”

The Kansas Methodist Foundation is honored to partner with the Pass the Torch committee to support the next generation of clergy through investing the scholarship endowment funds and helping administer the scholarship program. If you are interested in joining the retired clergy in their efforts, please contact the Kansas Methodist Foundation.



“It shouldn’t come as a surprise that textbooks are numerous and costly in seminary. The scholarship helped ensure that I was equipped and ready to learn. Seminary is the best resource for ministry. It has provided knowledge, experience, and colleagues to lean on in ministry. I am excited to be coming back home to the Great Plains.”

- Wesley Gately

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- Victor Peterson



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- Brenda Hogan

2021 Scholarship Recipients

KMF Seminary Scholarship

Yolanda Byers
Ally Drummond
Robert Fillmore
Wesley Gately
Jeff Graber
Priscilla Kaimathiri

Changhyun Kim
Charles Kitua
Chris Lehew
Chris Nord
Matthew Ozment
Victor Peterson

Abraham Ruffcorn
Valecia Vogts-Scribner
Grace Woods
John Wesley Young

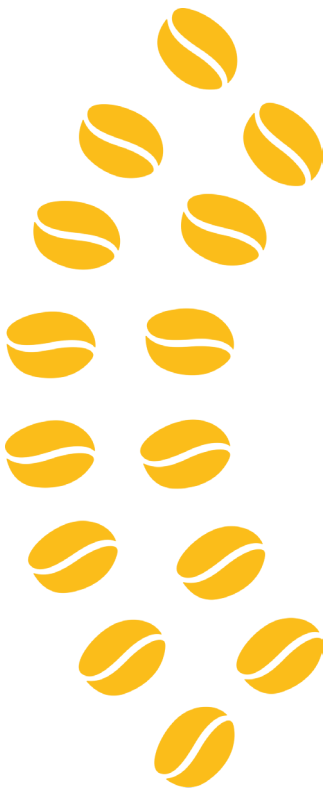
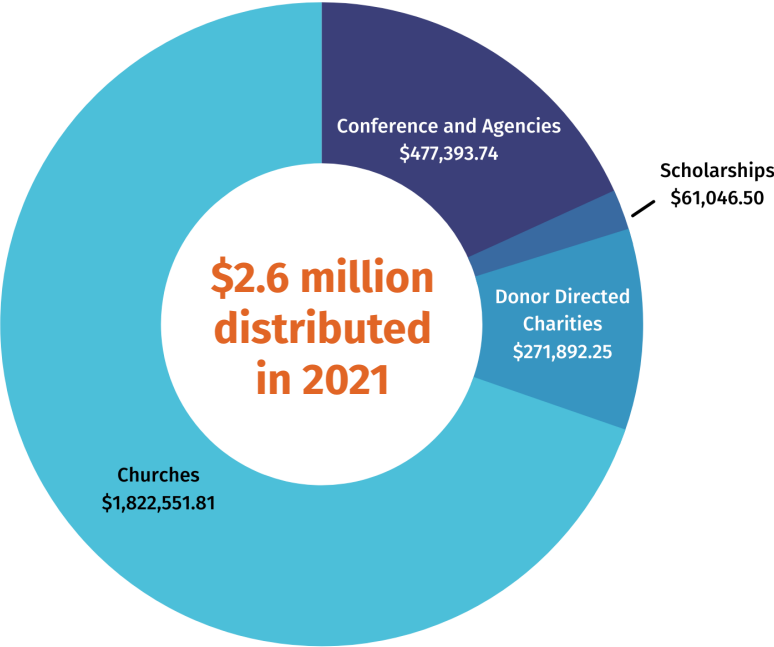
Pass the Torch Scholarship

Tiffani Brewer
Debra Copple
Wesley Gately
Jeff Graber

Priscilla Kaimathiri
Anny Kalingwishi Kapundu
Chris Lehew
Victor Peterson

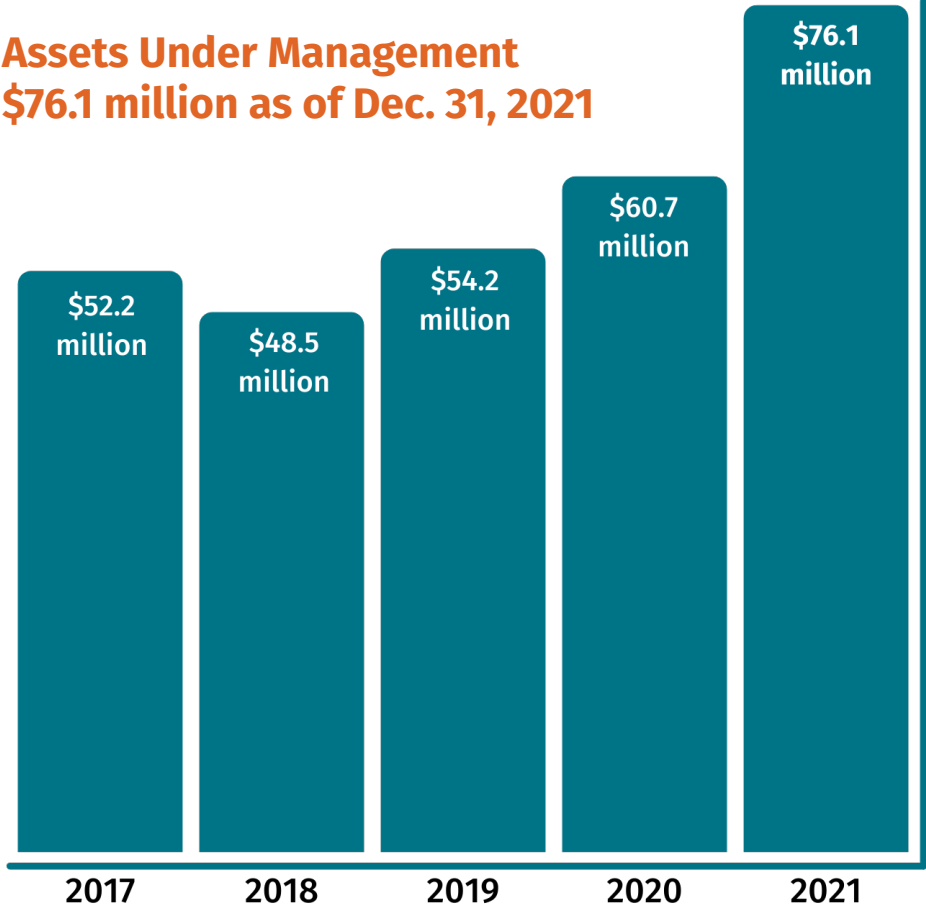
Abraham Ruffcorn
John Wesley Young

Helping Grow Ministry in Kansas



Through your generosity, KMF is proud to support organizations such as:

Africa University
Aldersgate Village
Asbury Park
Baker University
Camp Chippewa
Camp Horizon
Camp Lakeside
EmberHope Youthville
Forest Park Retreat Center
Genesis Family Health
GraceMed Health Clinic
Kansas Wesleyan University
Saint Paul School of Theology
Southwestern College
UM Campus Ministry
UMCOR
UM Open Door
Wesley Towers
and many more!



Thank you!

Thank you to the churches and organizations who created a new Managed Fund or Permanent Fund with KMF in 2021!

Bristol Hill UMC	Garnett First UMC	Tonganoxie UMC
Camp Chippewa	Gridley UMC	UM Foundation at KSU Wesley
Council Grove Dunlap UMC	Hutchinson First UMC	Wichita College Hill UMC
Derby Woodlawn UMC	Kansas Wesleyan University Foundation	Foundation
Emberhope Youthville	Satanta UMC	Wichita West District UMW
Fredonia First UMC	South Hutchinson UMC	
Garden City First UMC		

Thank you to the families who, in 2021, created a Donor Advised Fund, a Permanent Fund, or included KMF in their estate giving!

David and Karen Fieser	Rev. Tom* and Phyllis Schneider	Todd Crum
Garth Strand		Estate of Robert* and Dorothy* Spearow
James and Karen Rice Ratzlaff	Steve and Teresa Schulte	
Karla Sheffy and Ron Harris	Steven and Janis Kirkeby	

*indicates those who are deceased

Investments

Through a partnership with Wespath Institutional Investments, the Kansas Methodist Foundation provides competitive returns while investing in sustainable and socially responsible ways. We are grateful for the more than 200 churches and organizations who invest their resources for ministry with KMF.

2021 Rate of Return

	2021	Annualized		
		2-years	5-years	10-years
Balanced Fund	8.09%	13.62%	11.67%	9.78%
Equity Fund	12.21%	18.29%	15.16%	12.57%
Fixed Income Fund	-1.14%	3.45%	4.47%	3.88%
Short Term Income Fund	1.27%	1.48%	1.66%	1.11%

*Rate of return is net of investment fees. Historical returns are not indicative of future performance. The Balanced Fund performance is the Wespath Multiple Asset Strategy performance. The Equity Fund returns represent the historical data for the Wespath U.S. Equity Fund (55%) and the Wespath International Equity Fund (45%). The Fixed Income Fund performance is the Wespath Fixed Income Fund. The Short Term Income Fund is a combination of multiple investment instruments of the Foundation. The Foundation hired Wespath Institutional Investments on November 1, 2019. The Administration Fee of the Foundation is not included.

Helping Grow Ministry Leaders

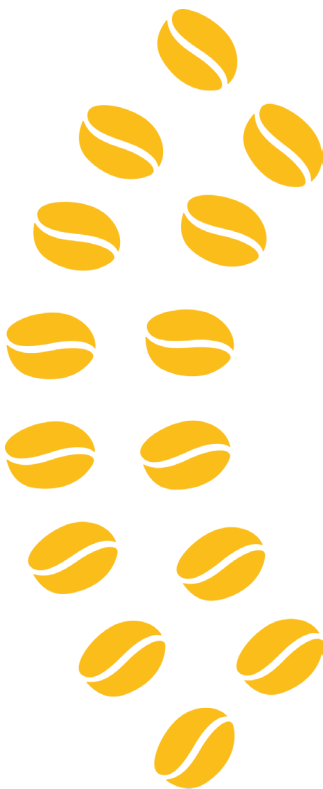
Clergy Financial Wellness Initiative

To help strengthen clergy leaders knowledge of personal and church finances, the Kansas Methodist Foundation started the Clergy Financial Wellness Initiative. In its first year, 12 clergy joined the 8-month training program. Throughout their time together, the group covered the *Saving Grace* and *Generous Church Leadership* curriculum.

The program is offered at no cost to the participants thanks to generous gifts to the Kansas Methodist Foundation's endowment and a grant from the Lilly Endowment.

Learn and Grow Series

In 2021, 121 people participated in the Learn and Grow Series which provided free webinars for clergy and laity. The topics of each session varied from giving, church ministry, personal finance, and more.



2021 Webinars

Recordings of the presentations are available at KansasMethodistFoundation.org under resources.

How to Talk to People about Giving
with Rev. Dustin Cooper, Horizons Stewardship

Annual Stewardship Campaigns
with Rev. Lance Carrithers

How to Start an Endowment Program
with Rev. Dr. Dustin Petz

Loans and Building Projects
with David McCaskill, Wesleyan Investive

Using a Narrative Budget to Share Your Vision
with Rev. Dr. F. Douglas Powe, Jr., Lewis Center for Church Leadership

Basics of Social Security and Retirement Taxes
with Ken Sokol

Your Input is Welcome

Is there a specific topic that would be helpful to you or your ministry? Let us know by emailing us at info@kansasmethodistfoundation.org.

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Randy Clinkscales Hays, KS	Ron Holt Wichita, KS	

“



I am involved with KMF because I care deeply about the vitality of congregations. I have experienced the impact of the work of the Foundation in my own life as well as the congregations I have served to inspire generosity and empower positive impact as part of God's kingdom. I am excited about the future possibilities of even greater impact through generosity and stewardship.

- Rev. Andrew Conard



I came to my faith within the Methodist Church as a middle schooler and the years since in the church have had a very positive impact on my life. Given the positive impact the Methodist faith has had on myself and my family, I believe the KMF can assist with the long-term financial sustainability of the Methodist Churches it serves. By doing so, KMF can serve the communities in which those churches reside, continuing the positive impact cycle it had for me for others.

- Shawn Wyatt

Staff



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Let's Connect

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[KansasMethodistFoundation.org](https://www.KansasMethodistFoundation.org)

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***“As each has received a gift, use it to serve one another,
as good stewards of God’s grace.”***

- 1 Peter 4:10



100 East First Avenue
P.O. Box 605
Hutchinson, KS 67504

\$2.6
million

given to churches, ministries,
and other non-profits

22

Pathways for Discipleship
Grants awarded

26

new funds established to
support future ministry

26

seminary scholarships
awarded

\$76.1
million

in assets under management
as of December 31, 2021

121

people participated in a
Learn & Grow Webinar