



**ANNUAL REVIEW
2023**

A photograph of a young woman in a purple graduation gown and stole, seen from the side, reaching her right arm up to throw her purple mortarboard cap with a yellow tassel. The background is a blurred image of a university building with a large emblem on its facade.

Milestones



From the President

BOB FLETCHER

Dear Friends,

As I retire and reflect on my thirteen years as President and CEO of the United Methodist Higher Education Foundation, I am reminded that this work is—above all else—a relational and connectional ministry. What a privilege it has been to be a part of it!

Before taking the job in 2011, I served on UMHEF's Board of Trustees and knew many people connected to the foundation. Back then, in an announcement about my new role, I said our programs would grow "by nurturing current relationships and creating new ones." Through the years, strengthening relationships has indeed been key to our growth and a source of great blessing for me personally.

By building relationships over these thirteen years, nineteen new scholarship endowments were launched, and our United Methodist Dollars for Scholars network grew by 85%. In addition to gifts from over 1,500 individuals, over 2,000 United Methodist churches, and twenty-nine annual conference foundations also supported this ministry. Friendships and connections have made it possible for us to award over \$28 million in scholarships that helped 13,200 students attend UM-related schools.

In the 2011 article, I also said, "UMHEF's ministry is of great importance to the future of The United Methodist Church. ...It is very important that we continue to grow and develop our programs for the benefit of our United Methodist institutions and students alike." Those words are even more true today as they were then, and I am confident the foundation will continue to impact students, their families, the Church, our educational institutions, and our global community for many years to come.

I am immensely grateful for our trustees, staff, and generous donors; and I give thanks for the churches, colleges, universities, and seminaries our scholarship recipients attend. Connecting students to the quality education those United Methodist-related schools offer is what this ministry is all about. Thank you, dear friends, for being partners in ministry.

A handwritten signature in black ink that reads "Bob Fletcher". The signature is written in a cursive, slightly slanted style.

Bob Fletcher, *President/CEO*

*COVER PHOTO: UMHEF Scholar
& High Point University graduate
Sara Gheitanchi*

Marking a Milestone

This review aims to reflect on the last year of our shared work. We also have much to look forward to in the coming weeks, months, and beyond.

As Bob referenced, he will be retiring from his position of President and CEO after thirteen years of faithful service. He will begin a sabbatical on June 30 before fully retiring on December 31, 2024.

The UMHEF Board of Trustees is thrilled to welcome Phil Jamieson as the incoming President and CEO, effective July 1.

Congratulations!

Notes of congratulations and well wishes to Bob for his retirement may be sent to:

UMHEF
Attn. Bob Fletcher
P.O. Box 340005
Nashville, TN 37203

MEET UMHEF'S NEW PRESIDENT & CEO PHIL JAMIESON

Phil joins UMHEF with more than three decades of experience in United Methodist ministry, planned giving, and fundraising. Since 2013, he has served as President for the United Methodist Foundation for the Tennessee/Western Kentucky Annual Conference and the United Methodist Development Fund for Tennessee/Kentucky. He also currently serves as the President of the National Association of United Methodist Foundations.

"I am excited to be joining the United Methodist Higher Education Foundation. This foundation does wonderful work helping students fund their education. I am passionate about that mission, and I look forward to joining with the board and partnering with our United Methodist-related colleges, universities, and seminaries in this excellent endeavor," Phil said. "I am very pleased to be following Bob Fletcher who has helped the foundation grow and thrive over the many years of his service."



Beginning July 1, you may reach Phil at pjamieson@umhef.org or 615-649-3976

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We give thanks for our current trustees and the leadership and dedication they give to UMHEF.

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*indicates ex-officio

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Kathy Boozer *Executive Assistant to the President*

Jamie Cook *Director of Scholarships*

Bob Fletcher *President and CEO*

Teresa Tysinger *Director of Communications & Public Relations*

Marti Williams-Martin *Director of Development*

Billy Lou Wright *Controller*

Introductions

These esteemed trustees joined the board in 2024.

Meet Wayne Moy

Wayne served as Co-Executive Director of The United Methodist Development Fund since 2011 and worked for years as property manager for the United Methodist Women. He is widely experienced in market trading and regulatory analysis.



Meet Chuck Thoele

Chuck is a Partner in Corient Wealth Management Services. Prior to joining the firm in 1991, he was a shareholder and investment committee member of a Dallas-based financial advisory firm. He has 30+ years of experience and a broad understanding of personal financial planning and investments.



Meet Dr. Melva Wallace

Dr. Wallace is the President and CEO of Huston-Tillotson University in Austin, TX. She has held positions as a chief of staff, vice chancellor, and associate dean, and has vast higher education experience managing student affairs and enrollment in multiple areas, ranging from athletics to recruitment.

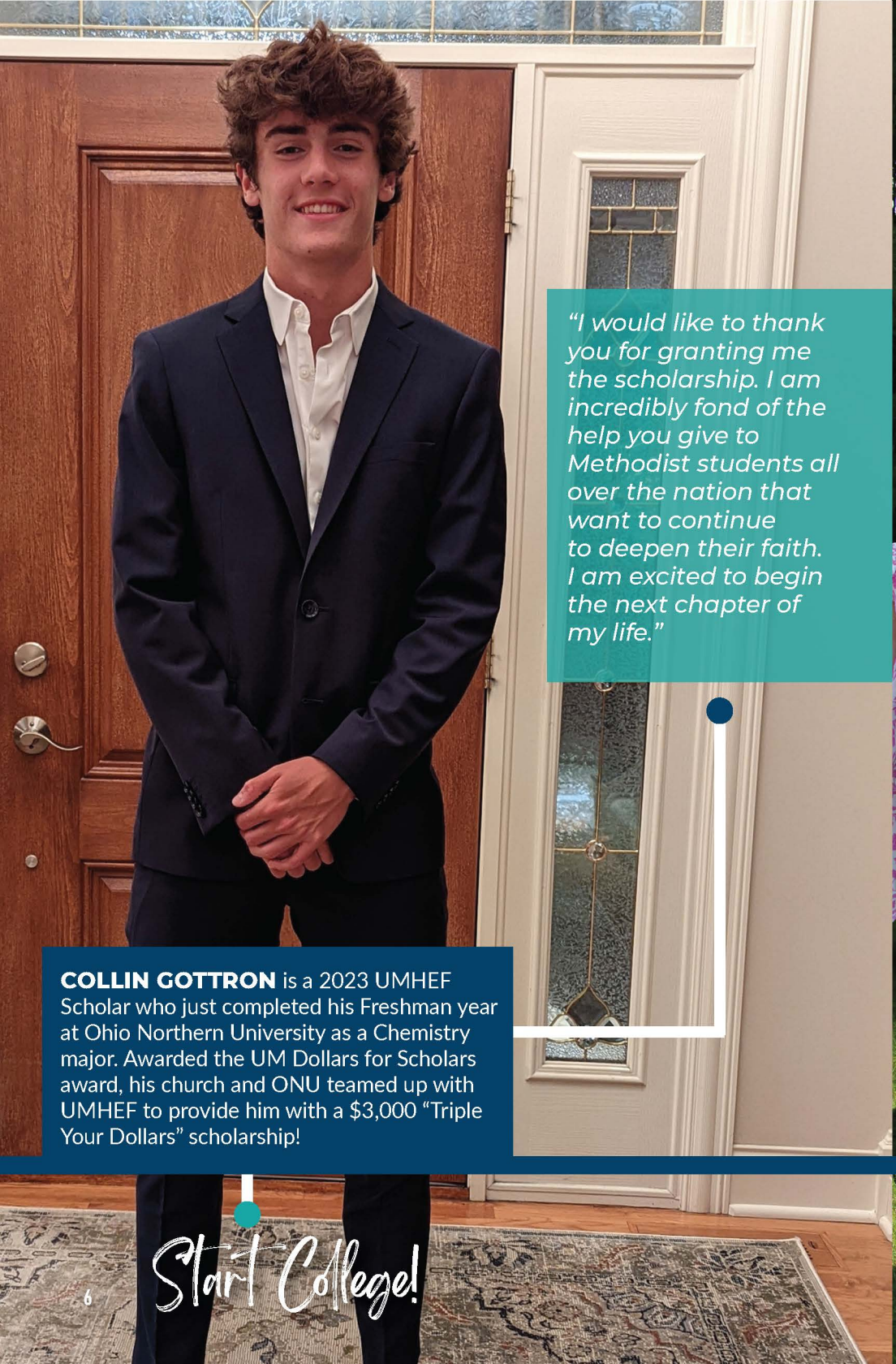


Meet Nancy Young

Nancy (MSW, MPA) recently retired from a 40-year career in nonprofit management and development. She was the Vice President of Development for the Georgia United Methodist Foundation where she developed the curriculum and trained churches in endowment development.



"I am honored to serve on the Board of Trustees of UMHEF. I have worked for over 12 years to raise support for scholarships for UMHEF in Georgia and now have the pleasure of seeing firsthand the impact on the lives of Methodist students throughout the country." - Nancy Young



"I would like to thank you for granting me the scholarship. I am incredibly fond of the help you give to Methodist students all over the nation that want to continue to deepen their faith. I am excited to begin the next chapter of my life."

COLLIN GOTTRON is a 2023 UMHEF Scholar who just completed his Freshman year at Ohio Northern University as a Chemistry major. Awarded the UM Dollars for Scholars award, his church and ONU teamed up with UMHEF to provide him with a \$3,000 "Triple Your Dollars" scholarship!

Start College!

"This scholarship helped me be so involved at my university. Without scholarships, I would not have had the time to involve myself because I would have had to be working full-time during school. This gave me time for my lacrosse team and a lot more time for my faith"



SHELBY O'NEIL is a UMHEF Scholar and 2024 graduate of Reinhardt University. She earned a Bachelor of Science degree and was on the school's women's lacrosse team, which won the NAIA Women's Lacrosse Nationals Championship, at which she was named MVP.

Graduate!

Facts and

\$1,931,544

\$42,724
more than
in 2022!

awarded in scholarships to
United Methodist
students in 2023, including:

\$1,072,596 \$741,948 \$117,000

Awarded in
UM Dollars
for Scholars
awards to

411
students

Awarded in
General
Named
Endowed
awards to

322
students

Awarded in
Foundation
Merit
awards to

39
seminary
students

\$111,750
was awarded to
32
students
attending
Historically
Black Colleges
& Universities

Total of 772 Scholars 538 to Undergraduates
234 to Seminarians

420

**2023 UM
Dollars for
Scholars
Partners**

308 Churches

89 UM-Related
Schools

23 UM Conference
Foundations

Learn more
about how
UM Dollars
for Scholars
works!



Figures

Since 1965, United Methodist Higher Education Foundation donors have provided support to over 35,000 students!

IN 2023

565

DONORS GAVE
A TOTAL OF

\$1,039,647

Thank you!

Every gift matters!
50% of gifts from individuals were under **\$100**

53% of 2021-2022 donors gave again in 2023

\$61,866,679

TOTAL UMHEF ASSETS

(as of 12/31/2023)

A UM Dollars for Scholars award begins with a scholarship from a student's church and is matched by UMHEF and our partners!

Church Award

UMHEF Match

UM School Match

UM Conference Foundation Match

\$1,000 + \$1,000 + \$1,000 + \$1,000 = \$4,000

possible award total per student!

The number and amount of matching awards are not guaranteed and may vary.



One UMHEF Scholarship Helps Seminary Students Reach Milestones

“There are not
enough words
to thank
UMHEF and
those involved
in providing
scholarships!”

- SANDRA

*UMHEF Scholar
and Graduate of
Boston University
School of Theology*

For each of the three years that Sandra Barrios attended Boston University’s School of Theology, she was awarded UMHEF’s Foundation Merit Scholarship. This longstanding award, which was designated in 2019 to support United Methodist students attending UM-related theological schools, distributes \$3,000 scholarships each year to students nominated by their schools. Since 2019, **\$555,000** has been awarded to **185** seminarians!

“There are not enough words to thank UMHEF and those involved in providing scholarships,” Sandra shared. “It helped me during rough times and honestly, I wouldn’t be able to graduate if it was not because of the scholarships I received. Thank you!”

Sandra reached two huge milestones this spring, graduating with a Master of Divinity degree and becoming a certified candidate in the New England Conference in which she is pursuing Ordination as a Deacon in The United Methodist Church. We give thanks for Sandra’s call and for the support UMHEF has been able to provide her.

Giving Thanks for the Support of UM Foundations!

For decades, UMHEF has partnered with United Methodist conference foundations to provide maximum scholarship support to students as “Quadruple Your Dollars” matching partners in our UM Dollars for Scholars program. These awards may reach up to \$4,000 per year.

We are grateful for these foundations who partnered with us in 2023 and collectively contributed \$234,000 toward scholarships:

Alabama-West Florida UM Foundation
Dakotas Methodist Foundation
Desert Southwest UM Foundation
Florida UM Foundation
Georgia UM Foundation
Heartspring Methodist Foundation*
The Holston Foundation
Iowa UM Foundation
Kentucky UM Foundation
Methodist Foundation for Arkansas
Methodist Foundation of Mississippi
Methodist Foundation of North Alabama
Methodist Foundation of Ohio
Midwest Methodist Foundation
Missouri UM Foundation
Texas Methodist Foundation
UM Foundation for the Tennessee-Western
Kentucky Conference
UM Foundation of Louisiana
UM Foundation of Michigan
UM Foundation of North Carolina Conference
UM Foundation of Western North Carolina
UM Foundation of West Virginia
Virginia UM Foundation

*Now a part of Texas Methodist Foundation



“Financial reasons would have been the only thing keeping me from attending FSC. These scholarships prevented me from having to go into debt to obtain an education.”

- KEVIN

Kevin Vondruska, a nursing student at Florida Southern College, received a \$4,000 UM Dollars for Scholars award in 2023 that included a match from the Florida United Methodist Foundation.

Honoring the Generosity

BENEFACTOR \$10,000+

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Alabama
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United Methodist Foundation of
Western North Carolina
Dr. Ken Yamada

PACESETTER \$5,000 - \$9,999

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Virginia
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We apologize if your name was omitted or listed incorrectly. Please call our office at 800-811-8110 or email umhef@umhef.org for any changes in future publications.



Thank you to these individuals who have created a legacy for future leaders by remembering UMHEF in their estate plans.

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Glener Gilland
Susan & Dave Grady
Tim Griffy
Gerald D. Lord
George M. Miller
Steve & Pam Parr
Brent Porter
Martha G. Rowlett
James W. Warner

Join the Wesleyan Heritage Society!

If you plan to include UMHEF in your will, please let us know so we can thank you in your lifetime. Visit umhef.org/legacy or email development@umhef.org.

Thank you for helping educate the leaders of tomorrow. Your generosity makes a difference.

Thank you!

In lieu of flowers...

Those four words make a powerful statement, indicating the family of a deceased person, individual donors, or sometimes the deceased themselves chose to rally others in support of a favorite nonprofit instead of giving flowers for the funeral.

It is common to include a request for tribute gifts in the obituary. If you want memorial gifts—in lieu of flowers—to be given to UMHEF when you die, be sure to share that with your family or include it in your will or other documents.

When such gifts are given to UMHEF, staff notifies the family or other designees that a gift was given. If you want to give in memory or in honor of someone, make that clear when you donate and provide the name and addresses of the people you want notified. When giving online, indicate you want to dedicate the gift, and provide the details.

Visit umhef.org/give and look for this line:

I would like to dedicate this gift in memory or in honor of someone.

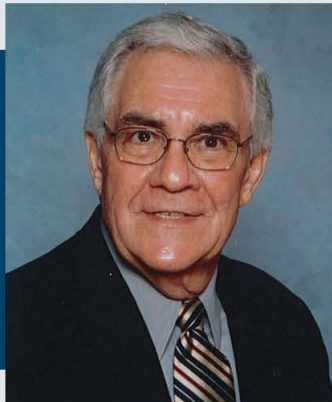


ENDOWMENTS: *Planned Gifts that Keep Giving*

From time to time, UMHEF has the honor of working with individuals or families to establish endowment funds. The foundation has more than 130 named endowment funds that help financially support the scholarships we award to qualifying students. These funds may designate support to students from specific UM conferences, attending certain UM-related schools, or who meet other preset criteria. Endowments have an impact on students today and far into the future!

Other common forms of legacy or planned giving include: bequests, charitable trusts, stocks, or appreciated securities. If you would like information on these or other types of planned giving, start at umhef.org/legacy.

Helping in a Different Way



Remembering Rev. Dr. Jim Gilland

The UMHEF community mourns the passing of Rev. Dr. Jim Gilland of Salisbury, North Carolina. Jim was a strong advocate for young people pursuing careers in ministry, especially young North Carolinians studying at his alma mater, United Methodist-related Duke Divinity School.

Through the years, Jim pastored numerous churches in North Carolina, served as the Superintendent of the Greensboro District, and preached or taught in 394 churches and institutions around the globe. In addition to mentoring young ministers, Jim was a proponent of equality and world peace.

Upon Jim's retirement from ministry in 1998, Providence United Methodist Church in Salisbury established the Jim and Glener Gilland Scholarship Fund. Each year, this fund enables UMHEF to award a scholarship to a Duke Divinity School student from the Western NC Annual Conference.

In a letter to UMHEF President and CEO Bob Fletcher in late 2023, Glener acknowledged the impact of Jim's legacy. "I've been pleasantly surprised at the notes we've received from pastors telling us how much Jim meant to them when they were beginning their ministry," she wrote. "Now he can continue to help young pastors, just in a different way."

When he died in July of 2023, Jim's family invited people to give memorial gifts to the Gilland Scholarship Fund. Jim will leave an indelible mark on the lives of young ministers for years to come.



“I am so grateful to anyone who has the kindness in their hearts to donate to such funds. On behalf of myself and many others, thank you!”

GRACE JONAS

UMHEF Scholar and Graduate of Emory & Henry College



Help United Methodist students keep reaching milestones!

**To send a gift, visit [UMHEF.org/GIVE](https://umhef.org/give)
or use the provided envelope.**

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