



A Legacy of Higher Education

2024 ANNUAL REVIEW



From the President

Dear Friends,

Every year is eventful. What, of course, stands out to us are the events of our own lives at any given time. For me, 1965 was the year I went to kindergarten. Unbeknownst to me, there were a number of other notable things happening. To name a few, Winston Churchill died; “Bloody Sunday” occurred with the Civil Rights march from Selma to Birmingham; the first American ground troops arrived in Vietnam; *My Fair Lady* won best picture; Muhammad Ali knocked out Sonny Liston, becoming world champion; the Second Vatican Council closed, and so on and so forth. During that same year, (without any reference by Wikipedia) the Methodist Christian Higher Education Foundation was formed.

Funny, isn't it? The most important world events of the time pass into memory. Their consequences continue to play out, but usually unnoticed by most of us. At the same time, God is at work, sometimes directly it would seem, bringing about unexpected good things. More often than not, however, God is bringing good out of difficult times.

For sixty years, the United Methodist Higher Education Foundation has attempted to cooperate with the good things that our Lord is doing. Thanks to the generosity of folks like you, we have participated in the usually unacknowledged work of making higher education more affordable for thousands of young people. You have helped provide a witness to the truth. Despite the brokenness of our reality, God continues to work and is not done with us.

Thank you for all your past support during the last year—highlighted in this review—and throughout the past decades. Here's to the next sixty years to which you and I are called to continue to participate in the gracious work of our Triune God.

Gratefully,



Dr. Phil Jamieson
President/CEO



This year, the United Methodist Higher Education Foundation celebrates sixty years!

Since 1965, UMHEF has supported the higher education of United Methodist students and the UM-related colleges, universities, and seminaries they attend.

Look for the 60 Years seal on the following pages for ways we're celebrating this milestone!

Entrusted with a grand vision.

Meet the UMHEF Trustees

We are grateful for the leadership and passion of our trustees!

CURRENT TRUSTEES

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Dr. Irma Clark
Rev. Cara Stultz Costello
Dr. Herman Felton, Jr.
Roland Fernandes (*ex-officio*)
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Director of Scholarships

Phil Jamieson
President and CEO

Teresa Tysinger
*Director of Communications
& Public Relations*

Marti Williams-Martin
Director of Development

Billy Lou Wright
Controller

NEW TO THE BOARD

These esteemed trustees joined the board this year.



Rev. Abby Auman has served in full-time ministry for nearly two decades. She is currently the senior pastor at Strongville United Methodist Church in Strongville, OH. Previously, Abby served as Superintendent for the Mahong Valley District in East Ohio Conference. She holds degrees from Ohio Northern University and Wesley Theological Seminary.



Dr. Lori Hardin has thirty years of experience in equine research and running small animal private practices in Arkansas, Oklahoma, and Florida. She holds degrees from Southern Methodist University and Oklahoma State University College of Veterinary Medicine. She currently resides in Dallas, TX.



Dr. Irish Spencer has spent more than thirty years developing corporate, foundation, public, educational, and philanthropic funding sources. She is President/CEO of Spencer Group, Inc. and FASK Inc. (Families Against Senseless Killings) and is a radio personality in Greensboro, NC. She holds degrees from NC A&T State University, Tiffin University, and Colorado Tech University.



Ronald Wilson is an estate planning attorney with decades of experience with national banks and associations. He has served on boards of several United Methodist foundations and national organizations. He holds degrees from Emporia State University, Washburn University, and Northwestern University's American Banker's National Graduate Trust School.

"I am humbled when I realize that I am able to give in part because others were generous in response to God's call so that I received gifts." Rev. Abby Auman, UMHEF Scholar alum, donor, and trustee



REFLECTIONS

As we celebrate six decades of commitment to the grand vision of making higher education financially possible for students, our trustees have a unique perspective on the past, present, and future of the foundation. Here are some of their reflections on the milestone.

Below: UMHEF Board of Trustees, circa 2005.



"It has been a high privilege for me to be involved in UMHEF for 45 years and to have worked closely with all UMHEF presidents. I have a clear sense of satisfaction that [the foundation] has grown from \$2.5 million assets to over \$60 million and offers scholarships to UM students to access higher education."

Dr. Ken Yamada

First connected with UMHEF in 1979 when he joined the staff at GBHEM; completed his most recent term on the board in 2024

"I have so many great memories of raising support for scholarships for UMHEF. I am thrilled to celebrate the 60th anniversary of UMHEF and the impact the scholarships have made on the lives of Methodist students across the country."

Nancy Young

Retired Vice President of the Georgia United Methodist Foundation; current UMHEF trustee

"Serving on the UMHEF Board is a passion for me. There is no greater cause in which to give than to those whose goal is to make higher education possible in our society! I pray that UMHEF's next 60 years will be just as exciting as its first 60 years!"

Jesse Ary

Former member of the Arizona State Board of Education; current UMHEF trustee

"I observed first-hand how scholarship assistance enabled well-deserving students to pursue and complete their higher education dreams. I gladly joined the UMHEF Board [...] because it affords me the opportunity to continue giving expression to what I consider the most important legacy for any pastor - calling forth and equipping the next generation of spiritual leaders."

Bishop Bruce Ough

Retired residential bishop in The UMC; current UMHEF trustee

Where are they NOW?

Do you ever wonder what UMHEF scholarship recipients are doing now? Here are updates from a few scholar alumni years after graduating from United Methodist-related schools thanks to the support of generous donors like you.

Amanda Nicol is now an ordained elder in the Pacific Northwest Annual Conference and lead pastor of Community UMC in Coeur d'Alene, ID. (Scholarship recipient from 2008-2012, 2015-2018; graduate of University of Puget Sound, Duke Divinity School)

Sarah Sisson is the Online Sales Channel Manager of ELPRO Services, a Swiss-based company, and the Communications Coordinator at her UM church. (Scholarship recipient from 2015-2021; graduate of West Virginia Wesleyan College)

Stacy Orr is the Chaplain at Methodist Richardson Medical Center and will be commissioned as a provisional deacon in the Horizon Texas Conference this summer. (Scholarship recipient from 2011-2015; graduate of Perkins School of Theology)

*"I am grateful
for the impact
and support..."*



Rev. Dr. Thomas Martin was a UMHEF scholarship recipient from 2001-2006. With degrees from Birmingham-Southern College, Duke Divinity School, and Candler School of Theology, he is now the Senior Minister at First United Methodist Church of LaGrange, GA.

"I went to college at a United Methodist college where I sensed a call to ministry and made plans to attend Duke Divinity School. I later received a Doctor of Ministry from Candler School of Theology. I have been in full-time ministry since 2008 and one of the great joys has been signing forms for students who decided to attend UMC-affiliated schools or have received [UM] Dollars for Scholars. Now, I serve on the board of LaGrange College, another UMC-affiliated institution. I am grateful for the impact and support of higher education from United Methodists and have seen the benefits extended to others throughout the years."

Photo courtesy of <https://lagrangefumc.org/>

Building a legacy takes a **VILLAGE**



Caleb Cesair is a UM Dollars for Scholars recipient alumni (2017-2022) whose scholarships were matched by the Georgia UM Foundation.



The work of the United Methodist Higher Education Foundation is not possible without a village populated by United Methodist-related higher education institutions, churches, and generous individual and organizational donors.

The North Georgia United Methodist Foundation, now the **Georgia UM Foundation**, was the first conference foundation to partner with UMHEF to provide “quadruple your dollars” matches through the UM Dollars for Scholars program. Today, more than two dozen foundations match funds—which begin with a \$1,000 sponsorship from students’ churches—for a scholarship worth up to \$4,000!

This partnership has been “an incredible opportunity for both organizations, the students receiving the scholarships, and the donors who easily saw the value of their investment,” says Nancy Young, retired Vice President of the Georgia United Methodist Foundation and current UMHEF trustee.

UM DOLLARS FOR SCHOLARS PARTNER FOUNDATIONS

Alabama-West Florida United Methodist Foundation
California-Nevada United Methodist Foundation
California-Pacific United Methodist Foundation, Inc.
Dakotas Methodist Foundation
Desert Southwest United Methodist Foundation
Florida United Methodist Foundation, Inc.
Georgia United Methodist Foundation, Inc.
The Holston Foundation, Inc.
Iowa United Methodist Foundation
Kentucky United Methodist Foundation, Inc.
Methodist Foundation for Arkansas
Methodist Foundation of Mississippi
Methodist Foundation of North Alabama
Methodist Foundation of Ohio
Methodists Helping Methodists Foundation
Midwest Methodist Foundation
Minnesota Methodist Foundation
Missouri United Methodist Foundation, Inc.
Oklahoma Methodist Foundation
Texas Methodist Foundation
United Methodist Foundation for the
Tennessee-Western Kentucky Conference
United Methodist Foundation of Louisiana
United Methodist Foundation of Michigan
United Methodist Foundation of North Carolina
United Methodist Foundation of Pennsylvania
United Methodist Foundation of Western
North Carolina, Inc.
United Methodist Foundation of West Virginia, Inc.
Virginia United Methodist Foundation

The Year in Review

\$1,914,196

Awarded in scholarships to a total of **749** Methodist students in 2024, including...

\$1,114,329

Awarded in UM Dollars for Scholars awards to **419** students.

\$709,867

Awarded in General Named Endowed awards to **300** students.

\$90,000

Awarded in Foundation Merit awards to **30** seminary students.



458 students were undergraduates



256 students were seminarians (+ 35 "other")



\$135,850 went to **35** students attending HBCUs

More About UM DOLLARS FOR SCHOLARS

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

\$1,000 sponsorship from a student's church +

UMHEF Match

UM School Match

UM Foundation Match

\$1,000

\$1,000

\$1,000

= \$4,000* possible award total per student!

In 2024,

427

UM Dollars
for Scholars
Partners
included

319 Churches

78 UM-Related Schools

30 UM-Conference Foundations

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

BY THE NUMBERS



Since 1965, United Methodist Higher Education Foundation donors have provided their support. Thanks to this generosity, in the last decade alone, the foundation has awarded upwards of **\$25 million** in scholarships to more than **10,000 students**.

Looking back to 2024 helps us envision another 60 years—and beyond!

In 2024

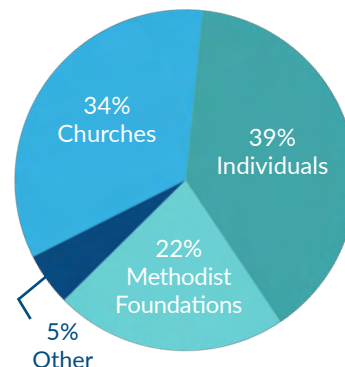
550

donors gave 869 gifts totaling

\$1,261,797

for a 21% increase over 2023's total!

Donor Types



Churches gave 34% of the 2024 total!

Out of all 2024 donors, 44 US states and the District of Columbia were represented!

\$64,085,514

TOTAL UMHEF ASSETS
(as of 12/31/2024)

Thank you, donors!

UMHEF DONOR HONOR ROLL

We are grateful for these donors who partnered with UMHEF in 2024 to support students!

BENEFACTOR (\$10,000+)

Mary C. Decker
Florida United Methodist Foundation
Rev. Martha H. Forrest
Georgia United Methodist Foundation
William & David Havill-Brown
Rev. Katherine Austin Mahle &
Stephen Mahle
Mary Alice Massey
Missouri United Methodist
Foundation
Elizabeth C. & W. Michael Ogie
Charles & Beth Thoele
United Methodist Foundation of
Western North Carolina

PACESETTER (\$5,000+)

Glenn C. & Leta Andrew*
Rowland Cook & Diane Ireson
Doug & Carolyn Dannen
Andrew & Molly Gabel
Cedric C. Gayle
Judy & Jim Gibbs
Tim & Missy Griffy
Iowa United Methodist Foundation
J. William and Elizabeth S. Robinson
Foundation
Dr. William & Susan Johnston
Jadd & Christina Masso
Midwest Methodist Foundation
Wayne & Dolly Shealy
St. Paul's Methodist Foundation -
Houston

Texas Methodist Foundation
United Methodist Foundation of
Michigan
United Methodist Foundation of
West Virginia
Virginia United Methodist Foundation
Vogel Family Foundation
Wespath

STEWARD (\$2,500+)

Bishop Minerva G. Carcaño*
Rev. Cara S. Costello
Dakotas Methodist Foundation
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Rev. Dr. Phil & Janet Jamieson*
Dr. Ruth A. Knox
United Methodist Foundation (NC)
Stanley & Rene Wilbur

PATRON (\$1,000+)

Alabama-West Florida United
Methodist Foundation
Dr. Irma Clark
Desert Southwest United Methodist
Foundation
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UM Foundation for the Tennessee-
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Western North Carolina Conference
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Nancy Young & Richard Rowland

BUILDER (\$500+)

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Joe F. & Elizabeth Harris
Dr. George M. Miller
Wayne & Julieta Gomez
Marie M. Nitschke
David & Kathy Peck
Rev. Shelia & Tom Preacher
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Dan & Carol Reeves
Justin W. Robinson
Jeff & Mary C. Taylor

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Marc A. & Diana C. Webster

SUPPORTER (\$250+)

Benevity Community Impact Fund
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Bishop David & Nancy Graves
Dr. Roger & Judith Ireson
Paul & Gail King
Phil & Mary-Lee Lint
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Louise Whitaker
Kerry & Mary Zastoupil*
David H. Zellner

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Eno E. A. Afon
Tanya Allen

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 Vince Alventosa
 Joseph & Janet Amato
 Gregory Andia
 David Atkins
 Rev. Abby Auman
 Josephine C. Baker
 Karen Balsbaugh
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 Ellen & Joe Jones
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 Susan Martin Taylor
 David L. May
 William & Judith McCartney
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Katey Perkins
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 Ralph W. & Lougenie J. Phifer
 Dr. Kelly Price-Rhea
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 Evelyn & Buddy Roberts
 Jodie & Jerry Roseberry
 Alan & Debby Scheufler
 Ed & Rose Schneeberger
 Kartika R. Shahan
 Gina Skelton
 Rev. David A. Snipes
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 Rev. Stella Tay
 Rev. Lonnie Thornton, Sr.

Jan Thurston
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 Watson
 Carol C. Wesley
 Carole West
 Rachel G. Wheaton
 Sharon Williams
 Steve Williams
 Marti & Lisa Williams-Martin*
 Mike Wolfarth
 Billy Lou Wright

**Monthly donors in 2024.*

“Graduating without any debt as a pastor is one
 of the best gifts Denise and I can give to those who
 will enter the ministry.”

*Rev. Gregory Adkins, donor and Wesleyan Heritage Society
 member; see page 14 for more.*

Thank you.

A Change in Attitude and a LEGACY OF GIVING

For most of their lives and ministry, **John J. and Barbara Dadd Shaffer** have shared what they call a "financial attitude of scarcity" that they attribute to their parents' experiences of the Great Depression. The fear of financial insecurity was with them from the time they married in 1962 through over forty of their sixty-three years together.

Most of that time, the Shaffers lived in Alaska where John, a United Methodist Elder, pastored multiple churches and held leadership positions within the Alaska United Methodist Conference. Barbara, a commissioned Home Missionary, worked for Alaska's Department of Labor, Office of the Aging, and the governor's office as a liaison for more than three dozen villages. The attitude of scarcity dominated their spending, saving, investing, and giving.

Yet, fifteen years ago, the couple intentionally shifted their mindset to make generosity and abundance—rather than fear—central to

their views about money. It wasn't easy. Barbara explains, "Our income and assets did not change. Our attitude changed."

Today, United Methodist Higher Education Foundation (UMHEF) scholarship recipients benefit from that attitude adjustment. Now retired and living in Washington, the Shaffers are passionate in their support of UM-related higher education institutions. They know firsthand that UM schools can shape lives. Both graduated from UM colleges, John from Illinois Wesleyan University and Barbara from Albion College, and they met on the campus of Garrett-Evangelical Theological Seminary. Barbara, who has served as a trustee for Alaska Pacific University and UMHEF, says there are unique advantages to receiving an education from UM-related schools. Those institutions were "founded on principles important to us," she adds. "Values are part of the structure and curriculum." Now, with an attitude of generosity and



*Wesleyan Heritage Society members,
John J. and Barbara Dadd Shaffer*

**LEARN MORE ABOUT PLANNED ►
GIVING THROUGH UMHEF**

abundance, John and Barbara are helping students receive an education from a UM-related school. They have established four scholarships: one with Alaska Pacific University, one with Claremont School of Theology, a third for students in the DR Congo, and the John J. and Barbara Dadd Shaffer Scholarship with our foundation.

Because the UMHEF endowment fund is already producing scholarships, the Shaffers can see the impact of their giving, and the UMHEF community can thank them during their lifetimes.

Plan your legacy of **IMPACT**

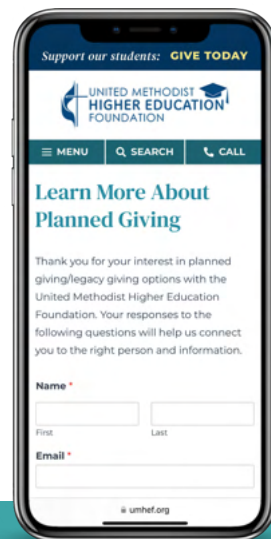
Planned giving, or legacy giving, has been instrumental in the sustainability and growth of the United Methodist Higher Education Foundation, but it is often misunderstood. Contrary to many myths and misconceptions, planned giving is not something only wealthy, aging people consider; it can be structured so donors can see some of the impact in their lifetime, and it isn't as complicated as you might think.

Common Forms of Planned Giving

The most common form of planned giving is a **bequest**, leaving a gift in a will. Depending on the donor's wishes, bequest gifts are used "where most needed," added to a particular existing fund, or used to begin a new endowment. *Plan to include the foundation in your will? Let us know so we can thank you in your lifetime.*

An **endowment** is a legal agreement about a donation to the foundation for a stated, specific purpose. Endowment funds are considered to be "perpetual gifts" because the principal funds are kept intact and only earned income is used.

Life insurance policies are most often thought to be ways of taking care of dependents or other loved ones, but donors can also list a nonprofit like the United Methodist Higher Education Foundation as a beneficiary.



"With this support, I can further my mission of strengthening communities through faith, leadership, and compassionate service."

Ezechiel Habwawihe, 2024 recipient of the John and Barbara Dadd Shaffer Scholarship and student at Garrett-Evangelical Theological Seminary

**START THE
CONVERSATION at
[UMHEF.org/legacy](https://umhef.org/legacy)**



The Wesleyan Heritage Society is a group of individuals who wish to include UMHEF in their estate plans or have established a legacy gift during their lifetime.

Leaving a LEGACY

Rev. Gregory & Denise Adkins
Glenn C. & Leta Andrew
Rev. Chris & Dr. Jennifer D. Barbieri
Dr. Edward & Twyla Benson
Dr. Richard M. & Donna L. Brown
Doug & Carolyn Dannen
Mary C. Decker
Rev. Paul & Stephanie Edwards
Bob & Debbie Fletcher
Glener Gilland
Rev. Susan & Dave Grady
Tim & Missy Griffy
David Havill-Brown
Rev. Dr. Gerald & Joan Lord
Rev. David E. Mansperger
Dr. George M. Miller
Bishop Bruce R. & Char Ough
Steve & Pam Parr
Dr. Martha G. Rowlett
John R. Sagan
John J. & Barbara Dadd Shaffer
Peggy Worth Townes
James W. & Constance T. Warner

UMHEF Endowment Funds 101

Establishing an endowment fund is a common form of planned giving in the United Methodist Higher Education Foundation community. They aren't as complicated as you might think.

- ✓ Typically, when a UMHEF endowment fund reaches a balance of \$25,000, the income earned from the fund will start producing a \$1,000 annual scholarship for many years to come.
- ✓ You can establish an endowment fund during your lifetime and contribute to it along the way, or plan for it to begin later, via a bequest.
- ✓ UMHEF's General Named Endowed Scholarship program includes awards from 130+ named endowments. Some are merit based or awarded to students who meet other criteria set by the donor.
- ✓ Endowment funds are not always connected to specific named scholarships.
- ✓ You can establish an endowment fund in honor or in memory of someone else, and invite others to help grow the fund.

LEARN MORE ABOUT PLANNED GIVING WITH UMHEF. Contact UMHEF's Director of Development, Marti Williams-Martin, at mwilliams@umhef.org or 615-649-3970. You can also submit the form at umhef.org/legacy.



Here's to another **60 Years!**

For six decades, the United Methodist Higher Education Foundation has helped shape the lives of students, their families, and the institutions and churches they attend. In so doing, the foundation and the generous people who share its mission have transformed the world. Recipients of scholarships twenty, thirty, or even sixty years ago have gone on to pursue a wide range of career paths, with many becoming leaders in the Church and other fields. In fact, UMHEF's current Board of Trustees Chair, Jadd Masso, is a former UMHEF scholarship recipient himself!

*Join us in celebration of this
milestone and help us embark on the next
60+ years with a special 2025 gift of
\$60, \$160, \$260, \$600, \$6,000
or any amount you choose!*

Give today at UMHEF.org/give





The *grand vision* of UMHEF is that it be financially possible for qualified students to attend United Methodist-related colleges, universities, and seminaries. An average of \$2 million in scholarships is awarded every year thanks to the generous support of donors and foundation partners.

With joy and **GRATITUDE**

"I'm reaching out with joy and gratitude in my heart to share the glad news of my successful completion of the Doctor of Ministry Program from Southern Methodist University Perkins School of Theology. [...] The scholarship granted to me greatly helped me in being a mature candidate with family and ministry responsibilities run on a single income."

SUMESH JACOB

Perkins School of Theology, Class of 2025

2024-2025 UMHEF recipient of the Lon Morris Scholarship



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