

David S. Bell, President & Executive Director of the United Methodist Foundation of Michigan, was interviewed recently to gain his insight about the impact of denominational changes and the formation of new expressions of Methodism on the Foundation's ministry. The full-length interview will be featured soon across a variety of platforms, including social media. Here is an excerpt.

[Question] Will the Foundation continue to serve the Church following any changes in denominational structure?

[Bell] Yes. The Foundation is available to serve all Methodist expressions that could emerge in the foreseeable future. Moreover, the Foundation is prepared to continue fulfilling our mission of helping faithful people live generous lives well into the future – under any foreseeable scenario in the denomination and beyond. We intend to continue our present partnerships, but we also are eager to grow new ones with emerging expressions of faith communities in the Wesleyan movement.

[Question] Are local church investments and other accounts secure? How do we know the Foundation will act in our best interest?

[Bell] All investment and donor-related accounts are completely secure. No entity, including the Michigan Conference, has access to investment accounts, donor records, charitable trusts, donor advised funds, or any other type of account. Moreover, only the authorized account signers on-file with the Foundation have access to statements, transaction activity, or account information. The Foundation, investment advisors, fund managers, and technology partners all serve as fiduciaries. Therefore, we are legally responsible to act in accordance with the best interest of each constituent.

[Question] Will the Foundation serve churches in the Global Methodist Church and other expressions of Methodism?

[Bell] Yes. Our board of directors undertook proactive measures almost five years ago to intentionally broaden our service offerings. This expansion was multi-faceted, but one of the areas of expansion was an explicit naming of serving all churches and non-profit organizations in the Wesleyan tradition. We amended our Articles of Incorporation and Bylaws to specifically state this policy. Since the late 1960's, the Foundation has served a wide range of constituents, including several entities beyond The United Methodist Church. We have multiple examples of recent actions which reflect our intent to serve a broad base of constituents.

[Question] Does the Foundation receive shared ministry funding from the Michigan Conference of The United Methodist Church? What is the current financial position of the Foundation?

[Bell] The Foundation is completely self-supporting. We do not receive any direct financial support from the Michigan Conference, like apportionment distributions. We also enjoy a very strong financial position. Our 2021 financial statement reflects an unsurpassed high in assets, including investments under management, loan fund

money, and Foundation endowments. Our Reserve Fund balance is greater than a full year of our annual budget. Our assets have grown by more than \$100 million in approximately the past decade through new deposits, major gifts, and market performance. Our current fiscal year operating budget is trending in a positive direction with income significantly outpacing expenses.

[Question] Will the Foundation's principled stance on conscientious investing be changing?

[Bell] No. The Foundation will adhere to its hallmark sustainable investment principles. Historically, the Foundation's socially responsible investment principles are grounded in John Wesley's pronouncement to "do all the good you can." Our investment principles align with values across the arch of Wesleyan faith expressions. In other words, our investment restrictions are common to people of faith, and collectively, manifest into a uniquely Methodist perspective on sustainable investing.

[Question] Can church leaders within new expressions of Methodism access the Foundation staff for consultation, coaching, and leadership training?

[Bell] Absolutely. The Foundation staff is very comfortable with the theological breadth of the Wesleyan movement. We preach, teach, and lead in congregations with divergent theological perspectives and all points in between. Frankly, we do so with great ease. Why? The spiritual discipline of generosity, faithful stewardship, and legacy planning ministry transcend the theological and social concerns that tend to fragment the Church. For numerous years, I was deeply involved with an ecumenical organization that focused on stewardship. The organization had participants across more than twenty denominations. Despite vast theological differences, our common faith connection of generosity and discipleship bonded us together in incredibly meaningful ways.

[Question] Will the name of the Foundation be changing to be more reflective of its expanded constituent base?

[Bell] The Foundation is currently engaged in developing a revised brand style guide. Some United Methodist foundations serving other areas chose to undergo a name change and rebranding process during 2018 and 2019 in anticipation of General Conference 2020 action. We, along with several others, chose to wait for General Conference action. However, we did not anticipate waiting until 2024. I won't say much more for now, but do you have any good ideas for a new name?