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## UMHEF Holds Annual Board Meeting

The board of trustees for the United Methodist Higher Education Foundation (UMHEF) has approved 975 scholarships for the 2002-2003 academic year. These scholarships will be provided from a \$1.4 million program budget by the Foundation, according to George M. Miller, president/CEO. The allocations were made during the annual board meeting held in Portland, Oregon, September 19-21, 2002.

A strategic planning session was held September 19 on the campus of Willamette University. The session centered on determining the direction UMHEF will take during the next five critical years of growth, and beyond. Roy Schilling, former president of Southwestern College, facilitated the day-long session, which ended with a tour of the Willamette campus.



"Double Your Dollars for Scholars," the local church matching \$1,000 scholarship program, will continue at a total of \$350,000 for 2003-04. That total includes matching

scholarships specifically designated for Hispanic, Asian, and Native American students who are eligible for HANA funds. These 25 matching scholarships are funded through the General Board of Higher Education and Ministry. Applications will be available online at the Foundation's Web site in December 2002, and will be accepted beginning February 1, 2003. **An application for this program may be found inside this newsletter, and is also available online at [www.umhgef.org](http://www.umhgef.org).**

**Roy Miller**, of Pacific Palisades, CA, was named **Trustee Emeritus** for his

generous support and inspiring leadership over his eight years of service on the board.

**T. Terrell Sessums**, of Tampa, FL, was awarded **Trustee of the Year** for his many years of outstanding service, dedication, and generous support of the Foundation.



Welcomed at the board meeting were new trustees: Paul Edwards of New Johnsonville, TN;

Kathi Austin Mahle of Minneapolis, MN; and Bob Sims of Louisville, KY. Other new trustees include Nancy Carruth of Bunkie, LA, and Henry Tisdale of Orangeburg, SC.

In other business, the following officers were elected: Stephen Harbison, Los Angeles, CA, Chair; Arden Melick, Manhattan, NY, Vice Chair; Eugene Decker, Houston, TX, Secretary; and Mark Nerio, San Antonio, TX, Treasurer.

A memorial service was held to honor the life of board member, **Vern C. Jones**, who passed away on August 4, 2002 in La Jolla, California. Vern is survived by his

wife of 47 years, Delores; sister, Eddie Barton and her husband, Cary Barton; sister-in-law, Patricia Jones; many nieces and nephews and cousins; neighbors; and a host of friends. Vern's exemplary commit-



ment to the Foundation and its mission, his leadership, and contagious enthusiasm over his years of dedicated service will be sorely missed.

# Cal Turner, Jr. Honored As Kresge Award Recipient

Cal Turner, Jr. was honored as the fourteenth recipient of the Foundation's prestigious Stanley S. Kresge Award at a luncheon October 18th on the campus of Lindsey Wilson College in Columbia, Kentucky. Speakers at this event included Dr. J. Howard Olds, Minister of Brentwood UMC, Bishop Robert H. Spain, and Dr. George Miller, UMHEF President/CEO.

The award was established by the Foundation in 1987 to honor a member of The United Methodist Church who embodies two important characteristics of the life of the late Stanley S. Kresge: dedicated membership in The United Methodist Church and unselfish support of United Methodist-related education.

"Cal Turner has been a long-time supporter of United Methodist institutions, especially higher education institutions, and Lindsey Wilson in particular," said George M. Miller, UMHEF President/CEO. "His leadership took Lindsey Wilson to another level.

"He is also a friend, neighbor, and true supporter of causes in the Nashville community, including Brentwood United Methodist Church, the YMCA, Vanderbilt, and many others," said Miller. "His philanthropy doesn't stop at Lindsey Wilson."

"During his years of service, Mr. Turner's leadership and unselfish giving transformed the once struggling junior college into the master's degree granting institution Lindsey Wilson is today," said William T. Luckey, Jr.,

President of Lindsey Wilson College (Columbia, Kentucky). "During his tenure, Lindsey Wilson College

has become the largest United Methodist-related institution in Kentucky, a fact directly related to his two decades of support.

"It is here where Mr. Turner has used the intellectual and capital resources with which he has been blessed to advance the Methodist mission behind the miracles taking place on our campus every day."

A graduate of Vanderbilt University, Mr. Turner is the CEO, Chairman, and President of Dollar General Corporation, a chain of 6,000 neighborhood stores operating in 24 states. Dollar General has more than 43,000 employees, with annual sales exceeding \$5.0 billion. Mr. Turner has served on the Lindsey Wilson College Board of Trustees since 1981, and as chairman from 1987-1998. He has also supported many various United Methodist causes, including Community Cares Homeless Shelter (Nashville, TN), Kentucky Annual Conference (Loucon Center), and Vanderbilt University Divinity School Endowed Chair of Wesleyan Studies (Nashville, TN).



L to R: Robert Holloway, chair of the Lindsey Wilson Board of Trustees congratulates Cal Turner, Jr., as George M. Miller, UMHEF President/CEO looks on.

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# John Sagan Servant Leadership Scholarship Awarded

Elizabeth Cademartori's interest in astro-physics and pre-theology inspired her to enroll at Ohio Wesleyan University (OWU), which was one of the few schools that could meet her educational needs. Her journey to OWU includes a connection more spiritual in nature, with an individual who, up until his death in 1999, was a devoted supporter, visionary, and friend of UM higher education: the late Dr. John Sagan. To honor his memory, the family created the John Sagan Servant Leadership Scholarship at UMHEF. Elizabeth is the first recipient.

The scholarship is for OWU United Methodist students who display exemplary leadership in church, academic campus, and community outreach activities, and who have a 3.0 minimum grade point average. The annual \$6,000 scholarship is not renewable.

"It [science and theology] is a very natural partnership—sort of like looking at the heavens from both

sides," Elizabeth says. "Just thinking about the creation of the Universe—if everything didn't happen at just the right time, we wouldn't have what we have today."

Her plans could include graduate school, combining her love for physics and theology. "Beth has never slackened in the integrity of her faith, her scholarship, or her personal character," says Rev. Jon Powers, who nominated Elizabeth for the award.

"She is truly a Sagan scholar."



L to R: Mrs. John Sagan, Sagan Scholar Elizabeth Cademartori, John R. Sagan, UMHEF President/CEO George M. Miller

## Letter from the President

Year-end greetings from your Foundation! As we reflect on the past year, it has truly been a time of change and growth for UMHEF.

Change has come in the form of transition from a fiscal year to a calendar-year accounting period. December 31, 2002 will end an eighteen-month accounting period for the Foundation as we transition into a calendar year for financial purposes. We have also completed the process of outsourcing our planned-giving administration to Synovus Financial Services. This decision allows us to contain costs while still providing exemplary service to those with whom we enjoy a planned-giving relationship. We have also employed a new audit firm, Lattimore Black Morgan & Cain, after many years with PricewaterhouseCoopers. Lastly, we are in process of changing our relational database software to Blackbaud's Raiser's Edge in order to support the additional development demands that have come as a result of our two new national endowment initiatives.

We have grown with the addition of Rhonnie Hemphill, Vice President

of Development, Historically Black Colleges and Universities Endowment; Mearle Griffith, Vice President of Development, Seminary Student Scholarship Endowment (see article below); and Donna Cottingham, Development Assistant. These individuals are busy setting up the structure for the two new \$300 million endowment campaigns. It is exciting to see grassroot support building for these two vital church-wide concerns. As always, we continue our commitment to raise funds in support of our grand vision that it be economically possible for any qualified United Methodist student to be educated at a United Methodist-related institution of higher education. I encourage you to learn more about the stewardship opportunities that the Foundation provides. Call us or check out our Web site at [www.umhef.org](http://www.umhef.org).

We have also grown with the addition of three new endowment funds to UMHEF: The Agnes B. and Benjamin F. Hildebrand Scholarship Endowment (for students attending Claflin College, Orangeburg, SC), the Universite Methodiste Au Katanga Endowed Professorship

Fund (for endowed chairs at the Methodist University of Katanga, Congo), and the Baltic Methodist Theological Seminary Endowment Fund (for general support of Baltic Methodist Theological Seminary in the Baltic). Despite trying financial times, we have been blessed in our pursuit to support United Methodist-related higher education by these exciting new opportunities.

Now more than ever before we need you to partner with us in these exciting pursuits. I encourage you to support the Foundation today with a year-end gift. As always, I welcome your questions, suggestions, or concerns regarding UMHEF.

Blessings for a healthy and prosperous new year!



George M. Miller  
President/CEO



## Mearle L. Griffith Appointed New Endowment VP

Mearle Griffith has been named as the inaugural Vice President of Development for the Seminary Student Scholarship Endowment.

Griffith comes to the position with more than ten years of experience in institutional development. Most recently, he served as senior pastor of the Church of the Saviour UMC, Cincinnati, OH. He has also served as Associate General Secretary of the General Council on Ministries, Iowa UM Foundation Executive Director, and Director of Communications in the Iowa Annual Conference. He currently serves on the board of directors for the Methodist Theological School in Ohio.

"Mearle exemplifies the vision of the seminary student indebtedness initiative," said George M. Miller, UMHEF President/CEO. "He brings a scope of fund-raising expertise and personal commitment that will

enable us to make great strides toward supporting our seminary students who are planning to go into ordained ministry of The United Methodist Church in the future. The Foundation looks forward to the development of this extremely important endowment."

The Seminary Student Scholarship Endowment campaign seeks to raise a minimum of \$300 million to address the long-identified problem of seminarians graduating from college with excessive financial burden as they enter into a position of pastoring and caring for others. The funds will be administered by UMHEF in cooperation with GBHEM and GCFA.



# Giving—Let Me Count The Ways!

By Richard D. Bailey, Regional Gift Planner

The gift of education is one of the most meaningful gifts that Christians make. Scholarships, grants, and designated trusts bring hope and opportunity that change the lives of young men and women. The United Methodist Higher Education Foundation helps to ensure the presence and influence of the Church in providing higher education in a Christian context. Last year the Foundation gave 890 scholarships totaling \$1,575,906. More students, more institutions, and more dreams were funded than ever before. This was made possible by people like you who believe in the importance of education.

Gifts people make to the Foundation take many forms to match family goals: undesignated gifts; named permanent endowments; chair endowments; charitable remainder trusts; education

unitrusts and annuities; memorials; bequests; life income plans; and Double Your Dollars for Scholars.

Many grandparents and parents are concerned with the cost of college for their children and grandchildren. **Did you know that you can help a student with college expenses and receive a charitable tax deduction?** The parent or grandparent transfers an asset into a special trust for a term of years. The donor receives an income tax deduction and bypasses capital gains if the trust is funded with appreciated assets. Trust income is distributed to a student at regular intervals. The income is taxable to the student, who is usually in a low tax bracket, and may pay little if any tax. The student is able to pay for tuition, books, and housing costs from the trust income. The trust is usually designated to cover the student's



college years. By properly designing the trust, a parent or grandparent may receive an income tax deduction, bypass capital gains, and pass income to the student, which also bypasses the gift tax. This is an excellent plan for a low-cost method to provide a college education to a child or grandchild.

All gifts to the United Methodist Higher Education Foundation are tax deductible to the full extent of the law. For information on making a gift of education, or establishing scholarships, call 1.800.811.8110, or use the attached form.

**The Foundation is self-supporting. It receives no funds through the apportionment process of The United Methodist Church. Its annual operating and administrative expenses are funded from income from its endowment fund and in-kind support from the Division of Higher Education of the General Board of Higher Education and Ministry.**

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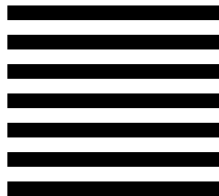
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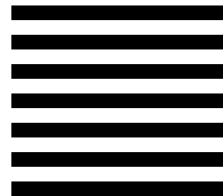
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YES! I want to make a difference in the lives of students across the country. Sign me up for the Foundation's **President's Council** today! Please contact me for payment of my gift of \$1,000 or more.

YES! I want to join other scholarship alumni in giving back. Sign me up for the Foundation's **Alumni Council**. Please contact me for a gift.

Name (Mr. Mrs. Ms.) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone (     ) \_\_\_\_\_ E-mail \_\_\_\_\_

**Yes, I would like information about funding an education trust for a child or grandchild gift annuity.**

I am interested in funding a scholarship.

Please tell me how to include UMHEF in my **estate plans**.

Please contact me about a personal visit.

The best time to call is \_\_\_\_\_.

Name (Mr. Mrs. Ms.) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone (     ) \_\_\_\_\_ E-mail \_\_\_\_\_