

Report to the Synod of 2018
From Moravian Ministries Foundation in America (MMFA)

Mission, Purpose and Values

The Moravian Ministries Foundation in America helps individuals, churches, and agencies grow and sustain the ministries that are central to their faith. We do this through gift planning, stewardship development, and investment management.

Responsibilities

The Moravian Ministries Foundation in America (MMFA) has three primary service areas:

1. Individuals – working with congregants within the Moravian Church to further define and help them achieve their goals and dreams of supporting the Moravian ministries they care about most through donor advised funds, planned gifts and/or perpetual funds and outright gifts.
2. Churches and Ministries – working with Moravian congregations, agencies and organizations to further God’s work in and through their ministries by assisting with stewardship, planned giving programs, and campaign services.
3. Administration and Investment Management – this area supports everything we do through our fiduciary responsibility and our Moravian Common Fund investment platform.

Summary of Activities

Our work with Churches and Ministries since the 2014 Synod includes the following:

Campaign services:

- King (King, NC): feasibility study
- Covenant (York, PA): feasibility study & campaign management
- Oak Grove (Winston-Salem, NC): campaign follow-up
- Christian Faith (DeForest, WI): campaign follow-up
- New Beginnings (Huntersville, NC): feasibility study & campaign assistance
- Grace (Mt. Airy, NC): feasibility study
- Unity Women’s Desk: feasibility study, campaign management & gift administration for campaign in Southern Province
- East Hills (Bethlehem, PA): feasibility study

- Camp Hope: feasibility study

Stewardship development:

- Kernersville (Kernersville, NC)
- Calvary (Winston-Salem, NC)
- Clemmons (Clemmons, NC)

Planned giving promotions:

- Palmer (Easton, PA)
- Home (Winston-Salem, NC)
- Board of World Mission
- Calvary (Winston-Salem, NC)
- Kernersville (Kernersville, NC)
- Konnoak Hills (Winston-Salem, NC)
- Graceham (Thurmont, MD)
- Moravian Music Foundation
- Marquardt

Multiple Services:

- Laurel Ridge: fundraising management and planned giving consultation

Common Fund (Investment Management)

The Common Fund saw an increase in value of nearly \$7,000,000 when comparing 9/31/2017 values to the same time period in 2014. Part of this reflects the run of a record stock market, but it also reflects client retention and growth. Since October 1 of 2014 the Common Fund experienced the following positive activity:

- New Investor Accounts added = 49
- Assets added = \$5.9M

Future Direction and Opportunities

As we shift our gaze toward the future of MMFA and the Moravian Church of North America, we feel the need to increase our focus on the individuals we serve and the congregants of the church. We will increase our services for individuals and be more engaged around planning and how their giving impacts the ministries they love and

their personal stewardship. MMFA will work diligently to proactively promote the tools of philanthropy and to provide individuals with solutions in terms of how they can support their church and/or the Moravian ministries they love.

In addition to supporting new plans and opportunities, we plan to increase the service we provide all existing clients (individual and churches). MMFA has always done a great job at responding to the call, but we want to proactively reach out and engage those we serve. There are so many wonderful things going on and we want people to know about them. We also want to ensure that the way we are serving is appropriate in all cases with every investor and person.

Our church and ministry work centers around impact. What impact are our churches and various supporting charities making and how do we help them reach further and deeper in their ministry areas especially around financial issues. This will at times consist of us helping them tell their story and highlighting the excellent work they are already doing. In other cases, it will be reformatting their message to reach new audiences. Many times, it will involve help with stewardship and development. MMFA is excited to offer stewardship support at no cost to our churches and ministries. We are working to build out what we offer and increase our resources available. We conducted a communications survey recently and 50% of respondents said they would come to a workshop led by MMFA. Another 40% said that they might come. This tells us that most people would show up to a workshop. Indeed the 40% would probably wait for a topic and then decide, but regardless it is extremely positive and it points to our congregant's hunger for information and a trusted friend to walk with them through stewardship and ministry support. Look for more information coming soon around enhancements to what MMFA offers and brings.

Last, but certainly not least, our administrative and investment management remain a staple to MMFA's offering. We will continue to offer the Common Fund while strengthening our resolve and enhancing the investment offering. We hope to expand our options in terms of the number of pools available and continue to deliver on a high-quality product and a low cost.

The overarching goal of MMFA is to be a trusted partner for all of those we serve within the Moravian Church. We are hopeful that by working together we can all move forward toward the call of Christ and His service. We hope to chat more with you soon and we look forward to Synod 2018.