

UMF Strategic Visioning 2023	Action Items - Consolidated
<p><i>GOAL I</i> <i>To build and nurture collaborative relationships which strengthen the body of Christ</i></p>	
<p><u>Strategies</u></p>	
<p>1. Foster and nurture social connections for our current and future constituents</p>	<ol style="list-style-type: none"> 1. Open House/Appreciation Events 2. Regional/On-the-Road Gatherings 3. Interactive Social Media <ol style="list-style-type: none"> a. Essay contests b. Artistic expressions c. Idea sharing 4. “Delegation” visits to potential institutional (non-church) clients 5. Cards to scholarship recipients 6. Celebrate diversity 7. Listening sessions/surveys for client needs/webinar topics
<p>2. Communicate our ministry offerings to achieve 100 percent name recognition among those we are called to serve</p>	<ol style="list-style-type: none"> 1. Define our market/service area <ol style="list-style-type: none"> a. Denominations of Wesleyan heritage b. Brand/market accordingly 2. Market effectively 3. Promote clergy debt reduction 4. Include partners in our communications
<p>3. Offer relevant educational programs</p>	<ol style="list-style-type: none"> 1. Youth/family financial literacy/psychology of money 2. EQ for Clergy 3. Strengthen relationship with Starrette 4. Focus on youth/lay leadership development rather than clergy
<p>4. Live-out the standards of the Foundation’s core values</p>	<ol style="list-style-type: none"> 1. Highlight and celebrate people living out our core values 2. Explore, connect and nurture partnerships that share our core values 3. Maintain loving accountability for staff and teams to live within the covenant and consistently practice our core values 4. Hold the covenant in prominent regard and strive to continually fulfill it

<p>5. Financially support ministries through grants and individuals through scholarships</p>	<ol style="list-style-type: none"> 1. Grants-finding workshop 2. Scholarship-finding workshop 3. Support those in vocational discernment 4. Mission and Ministry Mentors (local church/ministry internships) 5. Development of Wellness ministries/resources for same 6. Offer Seed/Micro Grants in conjunction w/TDE
<p>6. Explore, connect and nurture partnerships that share our core values</p>	<ol style="list-style-type: none"> 1. Highlight and celebrate people living out our core values 2. Explore, connect, and nurture partnerships with ministries and organizations that share our core values and with whom we have common purpose
<p>GOAL II <i>To faithfully steward the resources entrusted to us and inspire and equip others to do the same</i></p>	
<p><u>Strategies</u></p>	
<p>1. Manage a high-performing, socially-responsible investment portfolio through active engagement and prudent action(s)</p>	<ol style="list-style-type: none"> 1. Explore an incentive for new account holders 2. Use local church communicators as a resource
<p>2. Maintain a staff of qualified professionals who serve as trusted and knowledgeable resources for constituents</p>	<ol style="list-style-type: none"> 1. Ask new staff members to "shadow" each colleague to understand the roles 2. Consider how to liaison with disaffiliated churches 3. Look for professional associations relevant to our positions 4. Bring staff to Annual Conference on a rotating basis
<p>3. Maintain a pool of grant-writing professionals to help our constituents locate grant opportunities that align with their ministry endeavors</p>	<ol style="list-style-type: none"> 1. Record grant writing workshop 2. Develop a list of grant writing professionals around the Conference
<p>4. Develop and implement accountability measures for financial transparency</p>	<ol style="list-style-type: none"> 1. Spotlight on self-reporting measures that we already have in place
<p>5. Provide opportunities to educate and inform constituents regarding financial responsibility</p>	<ol style="list-style-type: none"> 1. Consider a tax preparation workshop for clergy
<p>6. Identify and share stories that celebrate the faithful use of financial resources</p>	<ol style="list-style-type: none"> 1. Continue to do Spotlight Stories, but be even more intentional in emphasizing how resources are used 2. Adopt "Lighter Notes" interviews to show a different side of people who work for/with Foundation

7. Offer annual constituent survey	<ol style="list-style-type: none"> 1. Decide when to publish a survey 2. Offer rewards to incentivize greater participation (gift cards, etc.)
<p><i>GOAL III To foster a culture of joy, trust, respect, and collegiality that celebrates and leverages our unique abilities, and unites us in common purpose for those we are called to serve</i></p>	
<u>Strategies</u>	
1. Create space and time for God to speak into the mission and vision of the Foundation	<ol style="list-style-type: none"> 1. Schedule quarterly team-building exercises; utilize professionals 2. Weekly/monthly meditative/prayer time
2. Adopt an intentional pattern of hands-on community service, with a priority on activities that support and enhance existing relationships	<ol style="list-style-type: none"> 1. Survey constituents to learn of volunteer opportunities (WHAT) 2. Look for volunteer opportunities in the grant requests (WHAT) 3. Plan quarterly/semi-annual days of service (How often) 4. Plan days of service with different clients or potential clients (WHO) 5. Partner with conference churches/ministries for a recurring day of service (How often) 6. Work with mission directors in the local church to identify projects compatible with our group (WHAT)
3. Conduct an annual employee satisfaction survey in conjunction with the annual performance evaluation Alternate: Quarterly Check-Ins and Yearly Employee Goal-Setting inclusive of Hopes & Dreams	<ol style="list-style-type: none"> 1. Research best practices for employee satisfaction surveys

<p>4. Encourage self-care personally and corporately</p>	<ol style="list-style-type: none"> 1. Schedule quarterly team-building sessions coupled with fun activities. 2. Bring in various healthcare professionals to lead self-care activities (yoga, meditation, stretching, chair massage, etc.) 3. Create a UMF physical activity challenge/program with incentives. 4. Bring in teachers for advanced technical teaching (Excel, etc...) 5. Quarterly Half-Day Fun Day (sporting event, lunch, activity) 6. Designated spiritual renewal times/days 7. Lunch Bunch Walking Group ("Sole Train" or "Tuesday Trainers") 8. 5k Charity Walks 9. Staff outing to Planthouse in Birkdale 10. Staff strawberry picking afternoon at local farm 11. Attend a Knights day game during the week 12. Bring Your Pet To Work Day 13. Can we consider more flexibility in the work schedule
<p>5. Discover unique abilities and support professional development</p>	<ol style="list-style-type: none"> 1. Staff members take a variety of gift assessments (ministry related and secular job related) to identify their strengths 2. StrengthsFinder, Workplace Big 5, Coaching
<p>6. Create space and time for colleagues to learn from one another</p>	<ol style="list-style-type: none"> 1. Ask random questions at the beginning of our staff meetings but with parameters to stimulate meaningful conversation 2. Service projects
<p>7. Encourage one another to function with the highest integrity</p>	<ol style="list-style-type: none"> 1. If we witness a colleague behaving in any way other than with the highest integrity, commit to a personal conversation with that person. 2. As individuals, commit to being open to this kind of discussion, remembering that everyone has agreed to operate with the Foundation's and every individual's best interest. 3. Lead by example. 4. Thank others when they teach you something you didn't know. 5. Give people credit when they have done a good job. 6. Annual review of Employee Policies with signed attestation.
<p>8. Adhere to best hiring practices related to staff position competencies</p>	<ol style="list-style-type: none"> 1. In addition to standard interviews, take promising applicants to lunch, to see them in "real world" situations on a more personal level 2. In addition to hard skills, search for prospective hires who have demonstrated community and/or church service, demonstrating a core passion for service 3. Add a paid internship program 4. Administer and utilize what can be gleaned from the Enneagram and DiSC profile surveys, as well as administer an Office 365 skills assessment 5. Have applicants read and reflect on the UMF covenant statement

<p>Recommendations for Listening Groups (Individuals, demographics) Select UMF Execs The Duke Endowment Wesley Community Development Bishop Carter & Cabinet UMF Board of Directors Reynolds Leadership Program Alums Young Clergy (<40) New Clergy (1st Year Appointment) Female Clergy Black/Minority Clergy Former UMF Staff</p>	
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