

The UMC Clergy Financial Well-Being Initiative Educational Projects 2017-2019

Since 2017, Wespath Benefits and Investments* has partnered with others, including the General Board of Higher Education and Ministry and the National Association of United Methodist Foundations to provide financial support to increase clergy financial literacy through financial education across the country. This chart summarizes those projects including the sponsor or host entity, a brief description and the purpose of the grant funds. Projects range from less than 20 to over 200 participants with funding levels from under \$5,000 to approximately \$20,000. United Methodist foundations have been important partners in many of these projects. These projects are all collaborative endeavors with financial contributions from multiple entities.

Provider Project	Description of Project	Purpose of Grant Funds
Alabama-West Florida UMF and Conference Generosity Training	Webinar and two educational events focusing on Acknowledging New Givers, The Offering Moment, and Quarterly Giving Statements by Generis Consultants	Financial incentives and event costs
Cal-Pac UMF and Conference Young Clergy Financial Literacy Day	Financial literacy session with benefit educator on retirement, taxes and personal finances	Funds covered cost of extra night of lodging
Northern Illinois UMF Early Career Financial Planning	Workshop and EY activities, conference and Wespath partners	EY Incentives
Georgia UMF Financial Literacy Pilot Project	Personal and congregational financial skills seminars, case studies format	Pilot project expenses
Wisconsin UMF w/district Engaging Congregations around Financial Issues	Mandatory district training on cultivation, giving and financial practices	Survey incentive, supplies, training costs
East Ohio UMF EY Incentive Project	Event attendees invited to meet requirements to use EY	Financial award for saving or debt reduction
UMF New England Steering Through the Fog	Stewardship Event – resourced by Horizons	Attendee Scholarships and event costs
Mississippi UMF EY Incentive Project	Conference and district promotion of EY use	Incentives for project completion
West Virginia UMF Financial Stewardship Academy	Conference financial literacy event led by Bell/Leary/Marden	Funding for event costs

West Ohio Conference Bishop's Black Clergy Retreat	Financial Wellness workshop, EY information and budget assignment	Incentives for EY use and event costs
Wespath revitup!	Education for young pastors and spouses on retirement, taxes, personal finances, and self-care	Scholarships for registration and lodging, also funded childcare
Missouri UMF Clergy Benefits Academy Scholarships	Encouraging Clergy Benefits Academy attendance	Scholarships for travel with local follow-up
Dakotas Conference Clergy Benefits Academy Scholarships	Encouraging Clergy Benefits Academy attendance	Scholarships for travel
Western North Carolina UMF Checkpoint Project	Assessment, Financial Literacy and Training Others- 3 Tracks focus on middle years	Incentives and resources
Kentucky UMF on behalf of First UMC Lexington KY Ministry Fellows	Seminary Internship/Debt Avoidance with financial literacy	Create project documentation for replication
West Ohio Conference Bishop's Day Apart	Financial Health Workshop during Conference event	Presenter's costs and incentive for EY use
Wespath Clergy Benefits Academy (CBA)	Education for pastors and spouses on retirement plans, personal finances, taxes, self-care	Scholarships for foundation staff registration costs
Georgia UMF Videography Project	Video of financial stewardship curriculum, includes case studies	Matching funds for videography – on hold
New Jersey UMF Starting Strong	Workshops on personal and congregational finances focusing on RIM participants	Attendance and follow up incentives
UM Stewardship Foundation PA Webinar Series	Series of webinars year-round on stewardship and discipleship topics	Incentive for participants who share information with three other persons and presenter's fees

*Funding includes Initiative to Address Economic Challenges Facing Pastoral Leaders by Lilly Endowment, Inc, UM foundations, conferences, registration fees and other donors.

For more information about these projects or to apply for funds for your educational activities, contact clergyfinance@wespath.org for additional information.