

UMC Clergy Financial Well-Being Initiative

Educational Projects as of Spring 2021

Since 2017, Wespath Benefits and Investments* has partnered with the General Board of Higher Education and Ministry, the National Association of United Methodist Foundations, and Discipleship Ministries as well as conferences, Boards of Ordained Ministry, and foundations to increase clergy financial literacy across the country.

These projects are collaborative endeavors with financial support from multiple entities. United Methodist foundations and conferences are significant partners and leaders for many of these projects. This chart summarizes project partnerships including the host organization, a brief description, and how the grant funds were used. Projects range from less than 20 to over 200 participants and from \$1,500 to over \$25,000.

Provider Project	Description of Project(s)	Purpose of Grant Funds
Alabama-West Florida UMF Generosity Training/Webinars, Saving Grace Cohorts	Webinars on New Givers, The Offering and Giving Statements by Generis and Saving Grace cohorts	Financial incentives and event costs, materials, and incentives
Arkansas UMF Financial Literacy Cohorts	Financial literacy cohorts	Trainers and materials
Cal-Pac UMF and Conference Young Clergy Financial Literacy Day	Financial literacy with Wespath benefit educator on retirement, taxes and personal finances	Funds covered attendee's lodging
Dakotas-Minnesota Area Clergy Benefits Academy Scholarships	Encouraging Clergy Benefits Academy attendance	Travel Scholarships
Duke Seminary Theology of Money from a Wesleyan Perspective	ACOS Course on theology of financial literacy and practical skills	Tuition subsidy and materials
East Ohio UMF EY Incentive Project	EY incentives	Financial award for saving or debt reduction
General Agencies/GCFA Generous Church Leaders Course	online course on generosity and financial stewardship	Video production costs
Georgia UMF Financial Literacy Pilot Project and Clergy Financial Academy	Personal and congregational financial skills seminars, case studies and online training	Educational resources and curriculum/videography

Kansas Foundation Saving Grace/Generous Church Leaders	Personal and congregational financial stewardship and literacy	Resources and incentives
Kentucky UMF on behalf of First UMC Lexington KY Ministry Fellows	Seminary Internship/debt avoidance with financial literacy elements	Resources and educational materials
Mississippi UMF EY Incentive Project	Conference and district promotion of EY use	Incentives for project completion
Missouri UMF Clergy Benefits Academy Scholarships	Encouraging Clergy Benefits Academy attendance	Scholarships for travel with local follow-up
Mountain Sky Conference RIM Financial Literacy	Wespath EY Personal Finances and Congregational Financial Stewardship	Resources and incentives
New England Conference/BOOM Financial Literacy for Provisional Members	Personal and congregational financial literacy	Resources and personnel
New Jersey UMF Starting Strong	Workshops on personal and congregational finances focusing on RIM participants	Attendance and follow up incentives
North Carolina Conference Saving Grace Cohorts	Personal finances curriculum	Materials and incentives
Northern Illinois UMF Early Career Financial Planning	Workshop and EY activities, conference and Wespath partners	EY Incentives
Peninsula-Delaware Conference RIM Academy	Personal financial literacy and congregational financial stewardship	Materials and retreat costs
Tennessee Conference Women's Well-Being Project	Financial literacy elements of well-being cohort and retreats	Financial well-being
Tennessee Foundation Saving Grace Cohorts	Saving Grace, financial counseling and incentives	Materials and incentives
Texas Conference Small and Mid-Size Churches	Financial literacy and generosity cultivation and campaigns	Retreat expenses
Texas Conference Cuban Pastors Project	Personal financial literacy and pastoral leadership	Seminary Scholarships
UMF of New England Steering Through the Fog, Generous Church Leaders	Stewardship event and educational cohort with incentives	Attendee Scholarships, event costs and incentives

Virginia Conference – Eastern Shore District Financial Literacy in Creating A Culture of Renewal cohort	Expansion of financial literacy content in leadership empowerment process	Delivery of financial literacy content, coaching and accountability
Wespath Clergy Benefits Academy (CBA) revitup!	Education for pastors and spouses on retirement plans, personal finances, taxes, self-care	Scholarships for registration costs, childcare at revitup!
West Ohio Conference Bishop’s Black Clergy Retreat	Financial Wellness workshop, EY information and budget assignment	Incentives for EY use and event costs
West Ohio Conference Bishop’s Day Apart Debt Payoff Incentive	Financial Health Workshop during Conference event	Presenters and incentive for EY use, debt reduction incentive
West Virginia UMF Financial Stewardship Academy	Conference financial literacy event	Funding for event costs
Western North Carolina UMF Checkpoint Project	Assessment, Financial Literacy and Training Others- 3 Tracks focus on middle years of career	Incentives and resources
Wisconsin UMF w/district Engaging Congregations around Financial Issues	Mandatory district training on cultivation, giving and financial practices	Survey incentive, supplies, training costs
UM Stewardship Foundation PA/Western PA Foundation Financial Leaders Academy	Pastoral Financial Literacy Leadership	Materials and expenses

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

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A collaborative project led by Wespath Benefits and Investments in partnership with the General Board of Higher Education and Ministry, Discipleship Ministries and the National Association of United Methodist Foundations partly funded by the Lilly Endowment Inc.’s National Initiative to Address Economic Challenges Facing Pastoral Leaders.

