

The Years Ahead

By The Rev. Ed Bailey, Executive Director and Richard K Thomas, Strategic Plan Committee Chair

Planning for 2016 - 2020

The United Methodist Foundation of Western Pennsylvania has an abundance of opportunities. Some of these exist because the world in which we operate is improving, while others derive from the ever-changing needs of our stakeholders. These opportunities call for a plan of action – not only to benefit the ministry of Christ through the Foundation – but more importantly to reach out and continue to serve Christ through the United Methodist churches and agencies of Western Pennsylvania.

Our World

Today's charitable giving environment is robust. According to the 2014 report of *Giving USA Foundation*, charitable giving in the United States has increased every year since 1971 with the exception of three recession years. Over \$100 billion is given to religious organizations each year.

At the same time, the number of worshipping United Methodists is declining in the United States. It was reported at the 2014 meeting of the National Association of United Methodist Foundations that the United Methodist Church is losing over 50,000 worshipers each year in the USA. Our congregations in the Western Pennsylvania Annual Conference exhibit some of the same declines in attendance. Additionally, congregations in our Conference tend to be small. Of our 800+ churches, at least 500 have an average worship attendance of 50 people or less. There are only 25 congregations in the Conference with over 250 people in average worship attendance.

The Strategic Planning Process

How do we help and engage United Methodist stakeholders in Western Pennsylvania in this environment? Our historical role has been to provide funds management for depositors while assisting in establishing endowments, providing grants, and offering stewardship guidance. We evaluated these current efforts through our strategic planning process.

Our entire Board of Directors participated in a Strengths, Weaknesses, Opportunities, Threats (SWOT) analysis. Although we are strong in integrity, socially responsible funds management, and programs for clergy, our Board felt that we are not as well-known and understood by our United Methodist base as we should be. Other charitable organizations are often considered for bequests and life-income gifts before one's home church or United Methodist agency. Furthermore, we cannot stimulate an individual to give or help a church develop its broader stewardship if we are not well-known and understood.

We are constrained by our primary revenue source – funds under management. We are also limited geographically to Western Pennsylvania, and members of our Board of Directors tend to be drawn almost entirely from the Pittsburgh vicinity. The Board wants the Foundation to think more outwardly, beyond Pittsburgh and beyond our customary boundaries.

Early in the planning process, a survey was conducted among various segments of our stakeholders and constituents. Valuable data from the survey was used to measure the effectiveness of current services and programs, as well as to evaluate and gather feedback for new services and programs to better serve the churches, agencies, and individuals of the Western Pennsylvania Annual Conference.

Please view a [Summary of the Strategic Plan](#) that has been developed for 2016-2020.