



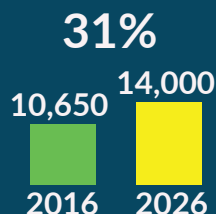
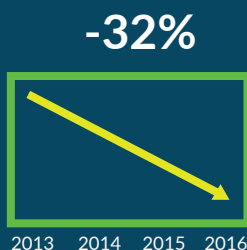
Executive Summary

Draft: 3/27/2017

The Challenge

Since 1885, the United Church Board for Ministerial Assistance (UCBMA) has provided financial and leadership support to authorized ministers and lay church workers within the United Church of Christ. UCBMA gave \$2.8 million in direct support grants and invested nearly \$1.4 million into its leadership programs in 2016. Much of this funding came from Our Church's Wider Mission (OCWM) and the \$1.5 million that is given annually by churches and individuals to the Christmas Fund.

Over the past four years, **funding from OCWM has declined 32%** – and the future of OCWM's continued financial support is uncertain.



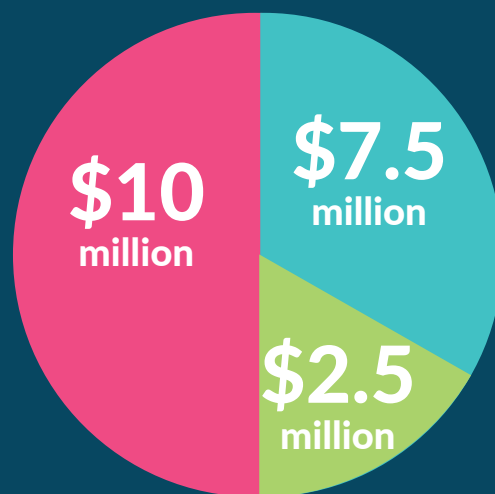
Additionally, **demographic shifts are expected to lead to a greater demand** for UCBMA direct support grants. In the next 10 years, the Pension Boards is anticipating a 31% increase in annuitants – from 10,650 in 2016 to 14,000 in 2026. Moreover, the rise of bi-vocational, second-career, and part-time clergy is leading to a retiree population with less predictable, and often insufficient, financial resources.

Authorized ministers today are faced with serving within the **changing context of congregational life**. To lead effectively, new skills, training, and tools are required. Funding for initiatives and programs promoting sustainable ministry is critical to meeting this challenge head on.

Finally, **there is a need to elevate the level of financial wellness among those who serve the church**. Student or other debt is a common challenge for many clergy. Raising the level of consciousness around this subject is essential to a healthy church.

The Solution

Pension Boards/UCBMA leadership has determined that the most effective, immediate, and sustainable solution to meet these challenges is through a \$20 million capital funds campaign. The funds will address three key areas of need:



- Enhancing direct support for current and future UCC retirees across the spectrum of existing grants **(\$10 million)**
- Funding for sustainable ministry and leadership initiatives **(\$7.5 million)**
- Improving the financial wellness of UCC authorized ministers **(\$2.5 million)**



The Pension Boards
United Church of Christ, Inc.

United Church Board for Ministerial Assistance, Inc.

UCBMA Planning and Feasibility Study Findings

To further UCBMA's mission to serve retired and active clergy within the United Church of Christ (UCC), UCBMA engaged professional counsel to conduct a Planning and Feasibility Study. The study, which ran from November 2016 through January 2017, resulted in **107** interviews with key clergy and lay leaders throughout the UCC to accomplish the following:



1. Determine the potential to raise \$20 million
2. Receive feedback and advice on UCBMA's case elements
3. Identify prospective campaign donors and leaders

The interviewees were from **24** Conferences and represented the constituent groups below:

Constituency	Completed	% of Total
Local Church Pastor/Authorized Minister	54	50%
Board Member - UCBMA, PBUCC, UCC, UCF	18	17%
Lay Leader	13	12%
Conference Minister	12	11%
Executive Staff - UCBMA, PBUCC, UCC, UCF	10	10%
TOTAL	107	100%

Cited Strengths of UCBMA



Commitment to caring for retired clergy

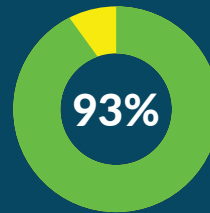


Leadership programs: NGLI and CREDO

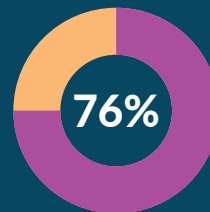


The Pension Boards as a strength of the denomination

The study concluded that our case for asking is strong, there is excellent leadership available and willing to assist us, and the prospects for giving exist to support the \$20 million objective. A selection of key findings is listed below:



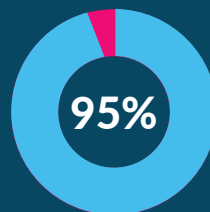
93% of participants characterized themselves as "very favorable" or "favorable" about the case to fund pension benefits, NGLI and CREDO, and a financial wellness program for clergy.



76% of participants indicated they would serve or consider serving in a campaign leadership position.



100% of participants responded "yes" or "maybe" when asked if UCBMA should move forward with a campaign.



95% of participants would give or consider giving to the campaign.



Significant financial potential surfaced during discussions with clergy who are willing to assist in this effort.



117 lay leaders, clergy, churches, and foundations were identified as potential leaders.

Campaign Leadership Committee



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Dan J. Carwile
Rev. Dr. Sheldon Culver
Rev. William R. Cunitz
Michael A. Downs
Rev. Dr. Rodney Franklin
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