

UNITED METHODIST HIGHER EDUCATION FOUNDATION

STRATEGIC PLAN 2009-2013 Strategic Priorities, Goals, and Objectives

Mission: *The mission of the United Methodist Higher Education Foundation is to develop and manage funds for scholarships for United Methodist students at United Methodist-related schools.*

Outcome: *The Foundation seeks to accomplish this mission through achieving the stated strategic priorities, goals, and objectives, which will provide the needed resources to achieve higher visibility and provide the management tools and funding necessary to ensure additional scholarships for United Methodist students at United Methodist-related higher education institutions.*

STRATEGIC PRIORITY 1: RESOURCE DEVELOPMENT

Enhance fundraising and fund management capabilities

GOAL 1: INCREASE FUNDING

OBJECTIVE 1: Develop a fundraising plan for review by the Resource Development Committee that will continue expansion of fundraising activities and capabilities being cognizant of the context in which we are raising funds, as noted in the 2004 feasibility study by Barnes & Roche that funds at the general church level are difficult to raise.

Responsibility: President, Director of Development

Time: Spring board meeting 2010

OBJECTIVE 2: Raise approximately \$5,200,000, inclusive of United Methodist Dollars for Scholars, from 2009-2012 in coordination with the Resource Development Committee and the UMHEF Board of Trustees.

Responsibility: Resource Development Committee Chair, Board of Trustees, President, Director of Development

Time: Spring 2012

OBJECTIVE 3: Engage trustees in the process of securing new donors and expanding the donor prospect pool through direct identification and introduction.

Responsibility: Board Chair, Resource Development Committee Chair, President, Director of Development

Time: Spring 2010

***OBJECTIVE 4:** Identify and cultivate new sources of funding, particularly by a thorough use of contacts obtained through UMHEF scholarship programs.

Responsibility: Resource Development Committee, President, Director of Development

Time: 2010

***OBJECTIVE 5: Deepen relationship with all current donors through meaningful and consistent follow-up and cultivation with a goal of increasing gift amounts.**

Responsibility: President, Director of Development

Time: 2010

***OBJECTIVE 6: Create a viable research process and conduct systematic ongoing research to identify prospective donors.**

Responsibility: President

Time: 2011

GOAL 2: OVERSEE PROPER INVESTMENT AND MANAGEMENT OF FUNDS IN ACCORDANCE WITH THE INVESTMENT POLICY STATEMENT

Responsibility: Finance Committee, Investment Committee, President

Time: 2009-2012

***OBJECTIVE 1: Review the investment policy statement annually.**

Responsibility: Investment Committee

Time: 2009-2012

***OBJECTIVE 2: Inform the Board of Trustees annually of any recommended changes to the investment policy.**

Responsibility: Investment Committee

Time: 2009-2012

STRATEGIC PRIORITY 2: GENERAL BOARD OF HIGHER EDUCATION AND MINISTRY

Strengthen the Foundation's relationship with GBHEM

GOAL 1: IDENTIFY AND PURSUE MUTUAL AREAS OF MISSION, COOPERATION, AND INTEGRATION

OBJECTIVE 1: UMHEF will continue conversations between UMHEF trustees and GBHEM Directors and, with approval of the UMHEF Board of Trustees, implement any recommendations or directives resulting from these conversations, as overseen by the UMHEF Board Chair beginning in 2009.

Responsibility: Board Chair, President

Time: Spring 2009

*** OBJECTIVE 2: In order to facilitate ongoing communication, UMHEF will be represented at each GBHEM Board of Directors meeting by the President and a liaison elected by the Foundation. UMHEF, via the President, will also invite the GBHEM Loans and Scholarships committee chair to attend UMHEF board meetings and Scholarship and Awards Committee and Resource Development Committee meetings.**

Responsibility: Board Chair, President

Time: Spring 2009

***OBJECTIVE 3: UMHEF will work with GBHEM to achieve its resource development needs for scholarships.**

Responsibility: Board of Trustees, President

Time: Fall 2010

STRATEGIC PRIORITY 3: VISIBILITY AND COMMUNICATIONS

Increase communications and awareness of the Foundation within the United Methodist community

GOAL 1: DEVELOP A COMMUNICATION PLAN FOR ACHIEVING RECOGNITION IN LOCAL CHURCHES, CONFERENCES, OTHER GIVING ENTITIES OF THE CHURCH, SCHOLARSHIP RECIPIENTS AND THEIR PARENTS, UNITED METHODIST-RELATED EDUCATIONAL INSTITUTIONS, AND EXPAND EFFORTS WHERE THE FOUNDATION PREVIOUSLY HAS NOT HAD A PRESENCE

OBJECTIVE 1: Expand relationships with strategic annual conference foundations through networking and programmatic opportunities.

Responsibility: President, Director of Development

Time: 2009

***OBJECTIVE 2: Increase personal contact and communication with donors and prospects through effective use of a variety of communication mediums.**

Responsibility: President, Director of Development

Time: 2009

***OBJECTIVE 3: Staff will develop a communication plan for consideration by the Public Relations and Communications Committee.**

Responsibility: President, Director of Development

Time: Spring board meeting 2010

***OBJECTIVE 4: Establish and implement a plan for expanding awareness of UMHEF through presentations at strategic churches and strategic annual conference entities.**

Responsibility: Communications/Public Relations Committee, President, Director of Development

Time: 2010

***OBJECTIVE 5: Improve clergy awareness of UMHEF through multiple communication means including personal contact and electronic marketing.**

Responsibility: Board of Trustees, President, Director of Development

Time: 2010

***OBJECTIVE 6: Develop a process to improve communication with and education of identified strategic annual conference leaders.**

Responsibility: Communications/Public Relations Committee, Director of Development

Time: 2012

GOAL 2: EXPAND STUDENT/PARENT AWARENESS OF SCHOLARSHIP PROGRAMS

***OBJECTIVE 1: Establish plan for presentations to student recipients at UM-related schools.
Responsibility: President, Scholarship Administrator, Director of Development
Time: 2010**

***OBJECTIVE 2: Implement plan for presentations to high school students at strategic churches.
Responsibility: President, Director of Development
Time: 2011**

GOAL 3: DEVELOP AND IMPLEMENT PLANS FOR COMMUNICATION WITH SCHOLARSHIP RECIPIENTS AND DONORS

**OBJECTIVE 1: Continue current policy of all scholarship award letters being on Foundation letterhead and all scholarship distributions being on Foundation checks.
Responsibility: President, Scholarship Administrator
Time: 2009**

**OBJECTIVE 2: Maintain communications with scholarship recipients when they become Alumni in order to facilitate more effective gift solicitation.
Responsibility: Director of Development
Time: 2009**

***OBJECTIVE 3: Strengthen UMHEF relationship with scholarship recipients through expanded multi-channel communication.
Responsibility: President, Director of Development
Time: 2010**

***OBJECTIVE 4: Establish and implement a process of communication with parents of scholarship recipients in order to facilitate more effective gift solicitation.
Responsibility: President, Scholarship Administrator, Director of Development
Time: 2011**

***OBJECTIVE 5: Expand current communications with scholarship donors in order to enhance fund stewardship and facilitate more effective gift solicitation.
Responsibility: President, Director of Development
Time: 2010**

GOAL 4: ENHANCE COMMUNICATIONS WITH UNITED METHODIST-RELATED SCHOOLS (E.G. COLLEGE AND SEMINARY CEOs, FINANCIAL AID DIRECTORS, CHURCH RELATIONS OFFICERS, ETC.)

**OBJECTIVE 1: Increase awareness of United Methodist-related college and seminary CEOs and other administrators about UMHEF's mission and work.
Responsibility: President
Time: 2009-2012**

Strategic Priority 4: Staffing and Facility

Provide suitable facilities and staff structure for the Foundation

GOAL 1: PROVIDE STAFFING THAT IS ADEQUATE AND APPROPRIATE FOR THE WORK OF THE FOUNDATION IN ACCORDANCE WITH THE STRATEGIC PLAN

OBJECTIVE 1: Provide adequate funding for appropriate opportunities for staff professional development to constantly improve efficiency and quality of office operations

Responsibility: President

Time: 2010

***OBJECTIVE 2: Develop a staffing timeline that leads to the full implementation of the strategic plan.**

Responsibility: Executive Committee, President

Time: 2010

GOAL 2: PROVIDE FACILITIES AND EQUIPMENT THAT ARE ADEQUATE AND APPROPRIATE FOR WORK OF THE FOUNDATION

Responsibility: Executive Committee, President

Time: 2009-2012

STRATEGIC PRIORITY 5: BOARD LEADERSHIP

Increase board effectiveness and satisfaction

GOAL 1: BUILD A BROAD BASE OF TALENT AND DIVERSITY FOR THE BOARD OF TRUSTEES

Responsibility: Trustee Nominating and Development Committee, President

Time: 2009-2012

GOAL 2: ENHANCE THE BOARD DEVELOPMENT PROCESS

***OBJECTIVE 1: Initiate an ongoing new Board member orientation process to help ensure a satisfying and productive board experience**

Responsibility: President

Time: 2010

***OBJECTIVE 2: Initiate an education process that will equip each board member for a satisfying and productive board experience.**

Responsibility: Trustee Nominating and Development Committee, President

Time: 2010

GOAL 3: EVALUATE BOARD STRUCTURE FOR MAXIMUM EFFECTIVENESS

***OBJECTIVE 1: Initiate an ongoing Board evaluation process to effectively address areas of concern and provide a sounding board for innovative ideas and recommendations.**

Responsibility: Executive Committee, President

Time: 2010

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