

2017 Strategy Road Map Digest

❖ Reason why ECF is engaged in this process

This document will guide our strategic, programmatic and financial thinking and actions in 2017.

❖ ECF's Mission, Vision and Identity Statements

ECF is an independent, lay-led organization that helps congregations, dioceses and other Episcopal communities of faith engage in visioning and planning, develop leadership and raise resources for ministry. ECF seeks to be a catalyst, agent and advocate for transformation, renewal and growth in practical, innovative and spiritually-grounded ways.

Mission: To strengthen the strategic, leadership and financial capabilities of Episcopal congregations, dioceses and related organizations to pursue their mission and ministry.

Vision for ECF: To be a comprehensive and holistic resource that helps revitalize Episcopal communities of faith.

Vision for the Episcopal Church: A growing number of vital congregations in service to God's mission with the capacity to empower and support their members to live out the Gospel.

Identity:

- ❖ ECF supports and empowers the Episcopal Church in fulfilling God's mission in the world by providing practical and innovative tools and solutions in the areas of visioning and planning, leadership and financial resource development.
- ❖ ECF seeks to impact positive change in the Church both at the grassroots and institutional levels while affirming the rich heritage of the Episcopal/Anglican tradition.
- ❖ ECF identifies and disseminates best practices and helps develop effective models for vital faith communities.
- ❖ ECF seeks to foster a culture of stewardship, philanthropy and generosity within the organization and throughout the wider Church.
- ❖ ECF forges partnerships and collaborations with other Episcopal organizations to maximize our impact and outreach and to avoid unnecessary programmatic duplication or replication.

❖ Definitions

Big Question – an opportunity, challenge or threat that ECF must respond to, potentially requiring a new or revised strategy.

Episcopal Community of Faith – any diocese or local faith or worshipping community including a congregation, parish, mission, chaplaincy, school, seminary, home church, emerging church or other gathering.

Strategy – a coordinated set of actions aimed at creating and sustaining a competitive advantage in carrying out ECF’s mission.

Transformation – the dynamic and spirit-filled process, through which a community of faith grows, revitalizes, engages in mission, adapts to change and prepares for the future. Transformation involves moving from:

- ❖ Membership to discipleship
- ❖ Raising money to nurturing stewardship
- ❖ Recruiting volunteers to developing leaders
- ❖ Clergy-centered models to lay+clergy partnerships

Transformational leadership - a model of leadership that seeks to motivate excellence and inspire extraordinary outcomes through a shared sense of purpose and mission, a compelling vision, strength in face of challenge, openness to change, and a commitment to the growth and development of new leaders.

❖ Impact that ECF is seeking to achieve

- ❖ Equipped and empowered lay and clergy leaders partnering to bring about transformation, renewal and positive change
- ❖ Vital Episcopal communities of faith
- ❖ Relevant and meaningful opportunities to live out Christian stewardship and effectively raise financial resources for ministry
- ❖ New, innovative and mission-based ways to be the Episcopal Church of the future

❖ Working Premises for 2017

- ❖ ECF will implement the second year of the programmatic elements associated with the grant from the Lilly Endowment and will ensure that existing programs are consistent with the underlying focus of this Initiative.
- ❖ ECF will effectively utilize ECF First Step as a comprehensive and holistic approach to the marketing and delivery mechanisms for all our programs and services for congregations.

- ❖ ECF will enhance internal fundraising and development, outreach and marketing and begin creating a long-term sustainability plan for various elements of the Lilly Initiative.
- ❖ ECF will have ongoing strategic conversations and reviews about organizational and programmatic focus and impact.

❖ **ECF's Ministry Model**

ECF Programs

All of ECF's programs are strategies for implementing our mission and, therefore, can be changed, modified or eliminated at any time. We often pilot new initiatives or ideas before they become start-up or ongoing programs.

ECF's programs fall into the following categories:

Visioning and Planning

Strategic Solutions – consulting services around a comprehensive approach to visioning and strategy planning for dioceses, congregations and other Episcopal entities – *fee for service*

Developing Leadership

Fellowship Partners Program – grants and other support for emerging transformational leaders in both academic and grassroots settings - *supported by endowment income and grants/gifts*

Vital Teams – a model of leadership development that engages, empowers and trains lay and clergy leaders to grow together as collaborative leadership teams. Includes training, advocacy and selection tools for congregations – *funded by designated gifts, fees and operating budget*

Educational Events – customized workshops and web conferences that equip clergy and laity with knowledge, skills and best practices - *provided at no cost as a marketing opportunity or for a nominal fee*

ECF Academy for Leadership, Development and Stewardship Education (ECF Academy) – customized training for teams and individuals – *fee for service*

Resources for Ministry

Annual Giving and Development – diverse and customized service options including Diocesan Annual Fund Drives, individual parish support and development reviews - *fee for service*

Planned Giving – education, planning, gift administration (charitable gift annuities and trusts) and *Planned Giving on Demand* - *revenue earned on fees generated from life income gifts under management; some fee for service*

Capital Campaigns - customized consultation that improves the financial vitality of a congregation, raises up new leadership and generates collaboration between lay leadership and clergy while raising financial resources for physical assets and other purposes ensuring continued ministry for the future – *fee for service*

Endowment Management Solutions (EMS) – consultation and technical assistance around visioning, organizing and investing endowments and permanent funds - *revenue earned on fees generated by money under management*

Donor Solutions – customized approaches to facilitating Episcopal philanthropy including an ECF branded Donor-advised Fund – *revenue earned on fees generated from assets under management*

Tools and Ideas

ECF First Step – an online assessment tool for congregations to help streamline the process of connecting congregations to available resources and to articulate and prioritize needs – *available at no cost*

ECF Vital Practices – web-based resource for Episcopal leaders that includes *Vestry Papers* articles, a blog for sharing ideas and experiences, stories about congregational issues and practical tools and resources – *supported by endowment and some gifts*

ECF Publications: *Vestry Resource Guide* provides guidance and information for vestry members; *Funding Future Ministry* helps congregations start or enhance a planned giving ministry and legacy society; *ECF Planned Giving Brochures & Booklets* provide comprehensive information about planned gifts and planning for the end of life; *Beyond the Baptismal Covenant* explores the need for a new kind of transformational leadership that calls upon lay and clergy leaders to work in full and equal partnership - *all publications are available for sale*

❖ ECF's Comparative Advantages and Opportunities for Partnership and Collaboration

- ❖ ECF is independent and lay-led but affiliated with the Episcopal Church.
- ❖ ECF has developed credibility as the place to go for innovation, practical information, tools and resources.
- ❖ ECF's webinars, Vital Practices and the *Vestry Resource Guide* reach a broad and diverse constituency.
- ❖ ECF is enhancing its Spanish language resources.
- ❖ ECF is impacting leadership models in the Episcopal Church through Vital Teams.
- ❖ ECF provides comprehensive and holistic services with customized solutions.
- ❖ ECF has strong and effective partnerships and collaborations with other Episcopal organizations.
- ❖ ECF develops new relationships and networks with ecumenical organizations.
- ❖ ECF is the main Planned Giving resource for the Episcopal Church.
- ❖ ECF has a professional, committed and passionate board and staff.
- ❖ ECF has endowment resources to implement its mission.

❖ ECF's Strategy Screen

The Strategy Screen is a tool for determining, in advance, the criteria for adopting or refining any new or ongoing strategy to answer the big question facing ECF. Each program or initiative shall meet the following criteria:

Mission – Does the program support ECF's mission of helping Episcopal communities of faith engage in visioning and planning, develop leadership and raise resources for ministry?

Transformation – Does the program help Episcopal communities of faith grow, revitalize, engage its members in mission, adapt to change and prepare for the future?

Competition – Does the program enhance ECF's competitive advantages and not duplicate or replicate comparable programs conducted by other Episcopal organizations?

Economics – Does the program pay for itself through fees or have the capacity to leverage sufficient philanthropic contributions for self sufficiency?

Culture – Is the program consistent with ECF's culture of innovation, practicality, collaboration and partnership?

Scope – Does the program directly reach a critical mass of ECF’s core constituencies, i.e., lay and clergy leaders primarily at the congregational and diocesan level?

Capacity – Does ECF have the infrastructure capacity to initiate or sustain the program?

Risk Management – Can the program’s inherent, potential or related risks be monitored and either managed or mitigated?

❖ Big Question Facing ECF

What is the big question ECF faces in 2017?

As an integral part of the Episcopal branch of the Jesus movement, how can ECF emphasize and focus more effectively on building up transformational lay and clergy leaders as we seek to promote new, innovative and mission-based ways to be the Church of the future? (*See definitions of Transformation and Transformational leadership on Page 2.*)

What types of strategies will address the big question and related questions?

- ❖ Leverage Vital Teams and the Lilly Initiative as key opportunities to promote transformational leadership, especially in shifting from a clergy-centric model to one of lay+clergy leadership teams.
- ❖ Build or enhance partnerships and collaborations with organizations and programs specifically around this model of leadership.
- ❖ Collaborate with the office of the Presiding Bishop and the wider church in developing transformational leaders for evangelism.
- ❖ Raise up, empower and promote ECF Fellows as key transformational leaders.
- ❖ Incorporate elements of transformational leadership in all of our core programs.
- ❖ Reflect theme of transformational leadership in ECF publications, resources, webinars, workshops and other events.

- ❖ Identify “Transformation” as key component of ECF’s Strategy Screen (See Page 5.)
- ❖ Pursue philanthropic opportunities to support and enhance ECF’s initiatives in these areas.