

**Painless Person-to-Person
Annual Budget Drive Workshop
with
Wayne B. Clark**

Sponsored by Mass Bay District

March 11, 2006

9:00 am – 2:00 pm

Summerfield Suites Waltham, MA

“There are three irrefutable rules that will assure your success in fundraising. Unfortunately, no one has ever discovered what they are.” —John Russell

©*Beyond Fuss and Beg:*
Stewardship for Faith Communities
By Wayne B. Clark

- **Moving Toward the Reality of Abundance**
- **Learning to Receive**
- **Dispelling Myths about Giving**
- **Making the Case**
- **“Searching for the Future”**
- **Orientation Workshop for Stewards**
- **“Forward Through the Ages”**

Stewardship Conversation Strengths

- **Deepens relationships**
- **Questions, answers, and feedback**
- **Confidential, informal setting**
- **High financial commitment**
- **Everyone takes responsibility**
- **Cost effective**
- **Personal growth/Talking about money**

Stewardship Conversation Challenges

- **Committed corps of volunteers**
- **Lots of time and energy**
- **Mature and sensitive visiting stewards**
- **Guidance by a consultant**

Commitment Sunday

Strengths

- **Motivational Speaker**
- **Visible**
- **Economical**
- **Fairly easy to implement**

Challenges

- **Service attendance**
- **Lacking in Spirituality**
- **Higher slippage rate**

Cottage Meetings

Strengths

- **Community and fellowship**
- **Low-key and informal**
- **Comfortable for new members**
- **Organization options**

Challenges

- **Limited ownership**
- **Negative voices could hijack**
- **Best for small congregations**

Annual Congregational Dinner

Strengths

- **The event is special**
- **A night out together**
- **Many commitments received**
- **Consistent message**

Challenges

- **Can be expensive**
- **Needs high attendance**
- **Social setting could obscure stewardship**

Other Approaches

- **Faith Promise**
- **Pony Express**
- **Telephone Appeal**
- **Direct Mail**

Leadership Team

- **Budget Drive Chair**
- **Leadership Gifts Chair**
- **General Gifts Chair**
- **Fellowship Event Chair**
- **Publicity Chair**
- **Publications Chair (see next slide)**
- **Follow-up Chair**
- **Budget Drive Treasurer**

Publications Team

Three documents

- 1. The case statement**
- 2. The brochure**
- 3. The financial commitment form**

Case Statement

- **Connection between case and mission?**
- **Enhance programs and ministries?**
- **What will be different?**
- **Spiritual expectations met?**
- **Why me?**

Brochure

- **Complete contact information**
- **Case statement**
- **Mission statement**
- **Suggested fair share giving guide**
- **Two pie charts**

Financial Commitment Form

Don't forget

- **Full church contact information**
- **Payment sequence**
- **Fair share commitment?**
- **List your name as a fair share donor?**
- **Exit statement**

Suggested Fair-Share Giving Guide

- 1. Supporter**
- 2. Sustainer**
- 3. Visionary**
- 4. Full Tither**

Annual Budget Drive Calendar

First month

- **Recruit all leadership team members**
- **Consultant's first visit**
- **Develop calendar**
- **Create communication strategy**
- **Develop program budget**

Annual Budget Drive Calendar

Second Month

- **Approve program budget**
- **Draft a case statement**
- **Plan fellowship event**
- **Create donor contact list**

Annual Budget Drive Calendar

Third Month

- **Consultant's second visit**
- **Plan leadership reception**
- **Recruit group leaders**
- **Create financial commitment form**
- **First letter (outline process/alumni/local)**

Annual Budget Drive Calendar

Fourth Month

- **Consultant's third visit**
- **Recruit table hosts and hostesses**
- **Approve case statement**
- **Recruit visiting stewards**
- **Second letter (personal conversations)**
- **First stewardship sermon**

Annual Budget Drive Calendar

Fifth Month

- **Share draft brochure with consultant**
- **Third letter (mission & stewardship)**
- **Second stewardship sermon**

Annual Budget Drive Calendar

Sixth Month

- **Match visiting stewards with donors**
- **Consultant conducts orientation workshops**
- **Hold leadership reception and fellowship event**
- **Third sermon**
- **Conduct all stewardship conversations**
- **Collect financial commitment forms**

Annual Budget Drive Calendar

Seventh Month

- **Pursue unreturned commitment forms**
- **Compute total money committed**
- **Hold close-out meeting**
- **Write all final reports**
- **Celebrate!**

Orientation Workshop for Visiting Stewards

- **Understanding the role**
- **Maintaining dignity**
- **Practicing in a safe environment**
- **Having some fun**

Guide for the Visiting Steward

- 1. The preliminaries**
- 2. Scheduling the stewardship conversation**
- 3. Conducting the conversation**
 - a. Share your personal story**
 - b. Listen to their story**
 - c. Ask for their financial commitment**
 - d. Thank them for their commitment**
- 4. The follow-up**

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