



## **Year-Round Stewardship Calendar Sample**

Task force members Chris Smith (lay leader, Unitarian Universalist Church of Vancouver, WA) and the Reverend Matthew Johnson-Doyle (Senior Minister of the Unitarian Universalist Church of Rockford, IL,) have developed this sample calendar. We are grateful for their thoughtful and helpful contribution.

To make your year-round stewardship program come alive, place all of your projected stewardship activities on a calendar. Use the following sample as a jumping off point, making the appropriate adjustments for *your* particular congregational rhythms and resources.

We recommend that FORTH become a vital part of your congregation's strategic planning process. The plan, including the estimated cost of each item, should be reviewed and renewed each year by the governing body.

Part A places the items of the four-year FORTH program into a sample yearly calendar. Part B contains a comprehensive calendar for an annual budget drive. A well-planned drive takes about nine months, with intense work just before the launch of the drive.

### **Part A: Putting FORTH Activities on a Calendar**

Notes:

- This particular sample assumes a July to June fiscal year, with a spring annual budget drive. Adjust it to meet your own congregational fiscal year.
- Some activities occur throughout each year, including creative and theme-based offertory introductions, new member stewardship invitations, and mailing monthly financial statements, with accompanying messages about mission/vision/ministry. These activities have not been placed on the sample calendar



### Year One: Focus on Generous Receiving

	Worship	Education	Community	Justice Work	Operations
<b>July</b>					
<b>August</b>	Ingathering: Celebrating the congregation's gifts		Commission and honor volunteers		Strategic plan team retreat: Create new plan or add 1 year to existing plan
<b>September</b>		Children's worship program: "I am saying thank you"	Initiate program: Integrating new congregants and coordinating volunteers	Review and improve "Share the plate" programs	Governing body plans resources for current year strategic plan
<b>October</b>			Discuss generous receiving in small groups, potlucks, etc.	Create Green Sanctuary team	
<b>November</b>	Grace and Thanksgiving	Gifts discernment workshops			
<b>December</b>	The importance of generous receiving	Guest at Your Table program		Guest at Your Table program	
<b>January</b>		Children's worship program: "Ways to make a difference in the world"			Assess and improve reporting process
<b>February</b>		Workshops on personal finances		Highlight justice work of congregants	
<b>March</b>	Sermons: "The meaning of stewardship"				Launch annual budget drive
<b>April</b>				Celebrate Earth Day	
<b>May</b>			Thank you party for volunteers		Strategic plan team adds 1 year to existing plan
<b>June</b>	Celebrate year one stewardship development progress		Annual meeting becomes a thank-you event		



### Year Two: Focus on Gifts, Call, and Spiritual Vocation

	Worship	Education	Community	Justice Work	Operations
<b>July</b>					
<b>August</b>	Ingathering: Spiritual depth and maturity		Review program: Integrating new congregants and coordinating volunteers		Governing body retreat: Envision planned giving committee
<b>September</b>		Children's worship program: "Letting your light shine"	Focus on membership process improvements		
<b>October</b>	Explore the idea of call		Highlight / strengthen lay pastoral programs	Become a certified Green Sanctuary congregation	
<b>November</b>		Workshops: "Let Your Life Speak" or similar.		Highlight members' call to justice work	Review and revise volunteer recruitment process
<b>December</b>		Children's worship program: "Redefining Gifts"			Create/revitalize planned giving committee
<b>January</b>	Sermons: "The spiritually-guided life"			Workshops: "Justice calling of congregation"	Review and revise annual budget drive process
<b>February</b>			Small groups discuss concept of call		
<b>March</b>	Sermons: Gifts, call, and spiritual vocation				Launch annual budget drive
<b>April</b>				Celebrate Earth Day	
<b>May</b>		Workshops: "Budgeting and money management"			Strategic plan team adds 1 year to existing plan
<b>June</b>	Celebrate people following their call				



### Year Three: Focus on Generous Giving

	Worship	Education	Community	Justice Work	Operations
<b>July</b>					
<b>August</b>	Ingathering: Celebrating the generous life		Review program: Integrating new congregants and coordinating volunteers		Governing body retreat: Review resources needed for strategic plan
<b>September</b>		Children's worship program on "Love Will Guide Us"		If not already, consider giving away all of every offering	Launch planned giving program
<b>October</b>				Expand Green Sanctuary: Create an environmental justice program	
<b>November</b>	Make connection between grace and giving		Plan an auction or other fundraiser with proceeds to support external ministries		Review and refine annual budget drive process
<b>December</b>					
<b>January</b>		Workshops: "Giving"	Potlucks to discuss budget hopes		
<b>February</b>		Children's program worship: "Pay it Forward"	Pay it Forward movie night		
<b>March</b>	Sermons: Generous giving				Launch annual budget drive
<b>April</b>				Celebrate Earth Day	
<b>May</b>				Allocate a portion of the operating budget to justice ministry	Strategic plan team adds 1 year to existing plan
<b>June</b>	Celebrating the congregation's year of work		Annual meeting becomes thank- you event.		



### Year Four: Focus on Sustainability

	Worship	Education	Community	Justice Work	Operations
<b>July</b>					
<b>August</b>	Ingathering: Using our inheritance for good		Review program: Integrating new congregants and coordinating volunteers		Governing body retreat: Discuss successes, needs from previous years
<b>September</b>		Children's worship program: "Seven generations"			
<b>October</b>	At Halloween: Remembering the gifts of the dead	Workshops on creating a living will		Continue environmental justice programs	Begin conversation on long-term stewardship development
<b>November</b>			Discuss: "The legacy we leave" in small groups		
<b>December</b>	Celebrating the promise of the future				
<b>January</b>				Highlight long-term partnerships for justice work	Review stewardship team charge and make-up; plan for changes
<b>February</b>		Workshops: Retirement / college financial planning			
<b>March</b>	Sermons: Stewardship sustainability				Launch annual budget drive
<b>April</b>		All – Ages Earth Day Celebration and Ecology Work			
<b>May</b>					Strategic plan team adds 1 year to existing plan
<b>June</b>	Celebrating the congregation's future		Annual Meeting thank-you event.		



## Part B: Annual Budget Drive Calendar

### Multi-year

Create and maintain long-term budget plan

### Yearly

Review and renew strategic plan

Enhance environmental programs

Short yearly financial reports, program oriented – line-item budgets available on request

Church governing body receives detailed breakdown of annual budget drive results

Budget discussions driven by congregation's mission/vision and strategic plan

### Monthly

Newsletter articles about stewardship: generosity, gratitude, giving and receiving

Financial report to governing body

Conversations with minister about congregational vision and personal commitment

### Weekly

Celebrate ways that church changes lives: testimonials, newsletter article, bulletin boards, weekly bulletins, sermons, website

Sunday collection message

Invite participation in church programs (staff to plan in larger congregations)

### As needed

Capital campaign to improve facilities and provide seed money for new programs and staffing

### Frequently

Annual financial commitment talks with prospective members before joining

“Nuts and bolts” orientation for newer volunteers

## Annual Budget Drive

**Note:** A more complete schedule can be found on pages 36-38 in [\*Beyond Fundraising: A Complete Guide to Congregational Stewardship\*](#)

### First and Second Months

Notify governing body of ABD leadership team

- Determine approach to the ABD (stewardship conversation, cottage meeting, Celebration Sunday, etc.)
- Set dates of key events and reserve facilities if needed
  - ABD kick-off (include staff)
  - Lead donor event or recognition (include staff) as appropriate



- Advance event if different from lead donor event
  - Community celebration (include staff)
  - Visiting steward or host recruitment
- Request UUA stewardship consultant for visiting steward orientation workshops
- Plan messages through the year around how church changes lives from many perspectives: RE, social justice, pastoral care, music...

**Third month**

- Review priorities from strategic plan to determine ABD theme
- ABD Leadership meets
  - Set brochure and communication theme
  - Gather volunteers
  - Begin budget development process

**Fourth month**

- ABD Leadership meets
  - Reviews schedules
  - Prepare communication: Decide on mailings, content, tools needed

**Fifth month**

- ABD Leadership meets
  - Follow-up with team leaders
  - Begin recruitment for visiting stewards or hosts
  - Continue budget discussions

**Sixth month**

- ABD Leadership meets
  - Continue visiting steward recruitment
  - Set budget priorities set

**Seventh month**

- ABD Leadership meets
  - Finalize brochure, print
  - Mail materials to coincide with kick-off timing
  - Prepare visiting steward/host kits
  - Continue visiting steward/host recruitment
  - Visiting steward/host training
- ABD leadership meets
- Hold lead donors reception
- ABD Kick-off event
  - Announce lead gifts total
  - Dedicate (covenant) visiting stewards/hosts
  - Offer stewardship sermons
  - Provide stewardship theme for Sunday morning children's time
  - Contact donors by visiting stewards

**Eighth month**



- Follow up calls completed where needed
- Results announced to congregation
- Celebration event for congregation
- Celebration event for visiting stewards/hosts and ABD Leadership
- Recruit leaders for next year's drive

### **Ninth month**

- ABD leadership meets
- Evaluation of ABD process
- Detail ABD report to governing body