



FORTH: Stewardship Team Formation and Charge

Authors:

Rev. Sue Phillips, UUA Clara Barton & Mass Bay Districts, District Executive
Barry Finkelstein, UUA Congregational Stewardship Services Consultant

Preamble

The FORTH demonstration project provided evidence that UU congregations can benefit from the creation of a permanent stewardship function and organization – a *stewardship ministry*. The purpose of the Stewardship Ministry is to sustain and deepen a broad-based commitment to the mission and programs of the congregation by inspiring a culture of abundance and generosity, and a joyful sharing of gifts, talents, and resources.

This work requires gifted leadership from people who not only understand and convey a spirit of generosity but who can convene the congregation around a compelling vision of giving. Congregational leaders should thus take special care to recruit and support members of the Stewardship Ministry Team.

Our experience indicates that for many congregations, creating a culture of stewardship is a multi-year process of transformation. Such change can be difficult and stressful, requiring careful and deliberate management. An important role of an ongoing stewardship ministry is to manage this multi-year process, and then to sustain the culture of abundance and commitment once it is established.

Recruiting the Stewardship Ministry Team

The most effective stewardship ministry teams will be good at a lot of things – from financial analysis to theological vision to inspiring communication skills. This is a tall order, which is why the makeup of the team is so crucial to successful stewardship ministry. The good news is that each person on the team needn't be an expert in all areas. But finding the right mix of skills in a group that can work well together is essential.

Through active recruiting and training, the congregation's leadership can create a stewardship ministry team with a mix of skills, competencies, and predilections:

- Passion about the congregation and Unitarian Universalism
- "Convening Authority" – a recognized ability to excite and engage people around a vision of generosity; an ability to motivate people to give and think generously



- Ability to think big and focus on the long term
- Patience and commitment to work for change over a three year period
- Communication skills using various media
- Analytical skills to assess progress and financial skills to understand operating budgets and projections
- Comfortable speaking about stewardship: generosity, money, gratitude, gifts

Supporting the Stewardship Ministry Team

Congregational leaders can support the stewardship ministry team in three ways: 1) offering a clear charge so the team understands the scope of work they are being asked to engage in and the resources they have to work with; 2) regular communication between congregational leadership and the team; 3) cheerleading and support.

Charge

Because they typically work across established committees and ministries in the congregation, stewardship ministry teams need a clear charge from elected leadership. A compelling and effective charge will describe the purpose of the proposed work and clarify its place supporting the mission of the congregation, the desired outcomes with a timeline, a clear scope of work, authorization to do the requested work, and a commitment of the governing body's resources to support the work. The material in this section provides a starting point. (Sample charges from two FORTH sites are attached.)

The stewardship ministry team is responsible for the strategic, long view of stewardship in the congregation. Its goal is to create and sustain a culture of generosity in which congregants are well informed about the finances of the organization, comfortable talking about money, participate actively and joyfully in annual budget drives and capital campaigns, and can articulate the linkage between the congregation's mission and resources. The team works with the minister, board, and other leaders to encourage discussion and learning about money and the need for funds to support the vision and mission of the church.

Scope of Work

The governing body must be clear about their charge to the stewardship ministry team. The scope of work should be comprehensive but still give the team room to decide the means of conducting its work. The team's scope of work will depend on the size of the congregation, existing committee structures, and established programs and ministries of the church. In many congregations, responsibility for the annual budget drive will be included in the scope to ensure a high level of coordination between long-term stewardship goals and yearly budget drive goals as well as helping to ensure a steady supply of skilled budget drive leaders.



The following examples are not meant to be exhaustive, nor are they required of every effective team. The essential functions however – vision, communication, and cross-committee coordination – should be in place regardless of congregational size:

- Work with all groups, ministries, and constituencies to promote stewardship
- Communicate via the congregation's web site, email messages, Sunday morning announcements, sermons, etc.
- Promote adult education stewardship programs – solicit ideas from the congregation, plan, recruit leaders, aggressively promote sessions
- Coordinate with the annual budget drive leaders to ensure that each year's drive fits into the long-range goals of promoting stewardship and raising consciousness
- Work with the membership team to encourage new members to become informed and generous contributors
- Work with the minister, religious educator, and religious education community to engage the children and youth in stewardship
- Track long-term progress of generous giving and a culture of abundance
- Coordinate stewardship efforts with endowment and planned giving efforts
- Coordinate with congregational strategic planning efforts
- Explore and promote the congregation's giving to outside organizations through its social justice ministry, recognizing that congregants will increase their generosity in proportion to the congregation's generosity and impact
- Research stewardship best practices and incorporate into congregational life

Ongoing Communication and Support

It is always tempting for congregational leaders to assign work to a competent committee, thank them, and move on to other business. Because the stewardship ministry team's work cuts across so many areas of congregational life, ongoing communication and coordination with the governing body and religious professionals is essential. This communication and coordination doesn't happen by accident, and it is not primarily the responsibility of the stewardship ministry team.

When issuing its charge to the team, the governing body should be clear about what resources of time and attention it is offering to support the team's efforts. For example, the governing body might offer periodic conversations with the team during governing body meetings and they might also appoint a governing body liaison. The minister and religious educator must be similarly clear in their offer of ongoing attention and support.

Organizational Placement

The placement of the stewardship ministry team depends on the organizational structure of the congregation and the extent and reach of the team's purview. However the team is positioned, it should be clearly linked to the formal governance structure of the congregation, typically reporting directly to the governing body. It should be a visible presence close to the core of the



congregation, and its members should be recognized in some formal way. Each congregation will have to sort out the relationships among the team and other related committees and functions, such as finance, endowment and planned giving, annual budget drives, membership, social justice, and fundraising. While it might be suitable in some congregations to establish the team as an umbrella organization, it is important to ensure that it does not get bogged down and distracted by the needs of day-to-day activities and events. It will lose its unique value if it doesn't maintain a strong strategic, big picture, and cultural focus.

For congregations with a council structure, the stewardship ministry team could be a new council — a self-perpetuating umbrella organization responsible for just about everything related to the strategic generation and use of resources. In other congregations, the team could be analogous to an associates program in the context of shared ministry, like worship or pastoral associates, carrying out a vital ministry of the congregation.

Long-Term Vision for Stewardship

Depending on where your congregation is starting, creating a culture of generosity, and the infrastructure to support such generosity, can take time. Culture change always does!



Sample Charters from FORTH Congregations:

1. Unitarian Universalist Church of Asheville, NC (UUCA)

- Stewardship becomes a year-round function of congregational life and includes the annual budget drive, stewardship education, and planned giving
- Stewardship is connected to our Unitarian Universalist identity of generosity and abundance. We are at ease with discussing money
- All UUCA families are involved in congregational activities beyond the Sunday worship service. More people participate at a deeper level
- Staff and lay responsibilities are well defined and supported
- Expectations for congregational support are clear (time, talent and treasure), and accepted by all ages from day one
- The congregation thinks big and beyond ourselves with a feeling of joyful abundance
- Giving increases as the congregation matures spiritually, emotionally and intellectually



2. Unitarian Universalist Church of Vancouver, WA (UUCV)



We come together
to deepen our spiritual experience and philosophical understanding,
to grow a vital, nurturing community, and
to act on our values in the wider world.

**Charge issued by the
Board of Trustees:
October 2010**

Stewardship Committee

Background:

From 2003 to 2010, the Stewardship Committee functioned as the fundraising arm of the congregation. In 2007, UUCV received a 3-year *Forward Through the Ages* (FORTH) grant from the UUA to explore stewardship concepts. Based on recommendations from UUCV's FORTH Steering Committee, the Board of Trustees created a separate Fundraising Committee and issued a new charge to the Stewardship Committee in 2010.

Relation to Mission:

To grow a vital, nurturing community by cultivating a culture of abundance, and to encourage spiritual growth and development by providing opportunities for deepening generosity.

Ministry Purpose:

To minister to the congregation by providing opportunity and encouragement to increase generosity in gifts of time, talent and financial resources to UUCV.

Areas of Authority:

All general appeals to encourage financial support for UUCV and its ministries through charitable giving (understood as giving without any tangible benefit to self).

Oversight and encouragement of UUCV's charitable giving in the wider world. This includes, but is not limited to, the Change for the World program and collaborating with the Minister on routine offertory collections during worship services.

*Specific
Responsibilities:*

Look for opportunities to nourish a culture of abundance at UUCV, including development of strategies that broaden



congregants' thoughts about giving and receiving.

Oversight of the Annual Budget Drive as well as soliciting mid-year pledges from new members.

Oversight of any capital campaign.

The Stewardship Committee is a member of Program Council and as such, shall be represented by the Chair or another designee and will follow the guidelines and expectations for participation.

Familiarization with, and adherence to, policies and operating rules enacted by the Board.

Relationship to Staff:

In working with staff, the committee is encouraged to collaborate in areas where there is mutual interest, seek counsel and support when needed, and maintain openness to suggestions in areas of staff expertise.

*Limitations /
Constraints:*

The Stewardship Committee will ensure that the timing of the Annual Budget Drive is coordinated with the Minister, Congregational President, and Budget Director.

Special collections or other charitable giving activities for urgent humanitarian relief are authorized by the Minister, or if he/she is unavailable, the congregational President or Vice President.

Fundraising through the offering of goods, services, and items of value is under the authority of the Fundraising Committee.

Solicitation of donations for the UUCV Endowment Fund is under the authority of the Endowment Board.

FORTH



A Stewardship Development Program

5.17.11