

# FORTH

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A Stewardship  
Development Program



**Unitarian Universalist Association  
Congregational Stewardship Services**

# **FORTH**

## ***Part 1: Background, Resources, and Community***

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# **Introduction**

Large Church Conference, Minneapolis, MN  
Saturday, March 19, 2011

# Accommodations?

## Workshop Goals

1. Learn about the FORTH origins
2. Understand the FORTH roadmap
3. Learn to use the *Stages of Stewardship Culture*
4. Appreciate the importance of *The Art of Thriving*
5. Learn how to create a FORTH community

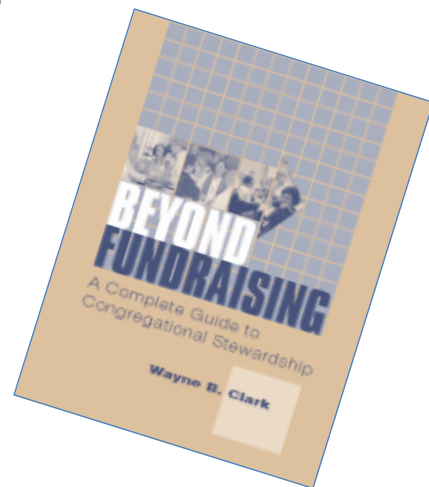
# Burning Questions?

**Introduction**

## Development of FORTH

**FORTH, Chapter Seven**  
**In *Beyond Fundraising***

**Available at UUA Bookstore**  
**[www.uuabookstore.org](http://www.uuabookstore.org)**



**Development of FORTH**

## **Development of FORTH**

- Stewardship education
- Joyful giving
- Ministry and good works
- Annual budget drive
- Planned giving

**Development of FORTH**



## **FORTH**

### ***Demonstration Project***

- 2007-2010
- 7 congregations, diverse qualities
- Support of a stewardship consultant
- Data gathered, results compiled, final report written
- Full report available on [UUA.org](http://UUA.org)

**Development of FORTH**

# **FORTH**

## ***Demonstration Project Key Learnings***

- Importance of stewardship education
- More engaged in stewardship activities
- Stewardship as a year-round experience
- Long-range planning = planned giving
- Must have at least one champion

**Development of FORTH**

## **Development in 2010**

### **Mark Ewert**

- ✓ Compiled, coordinated, created materials
- ✓ Self-assessment
- ✓ Stages of Stewardship Culture

### **Wayne Clark**

- ✓ Oversight and support

### **Robin Nelson and Jesse Holm**

- ✓ Technical support and video production

**Development of FORTH**

## **Development in 2010**

Several taskforces produced new FORTH materials:

- Lay leaders in congregations
- Congregational minister and administrator
- District executive and program person
- Congregational Stewardship Services consultants

**Development of FORTH**

## **FORTH (soon)**

### **Web Based: UUA.org**

#### ➤ **Online library**

- Video, documents, slideshows, weblinks, audio, etc
- Open to anyone to visit/browse
- Will grow over time

➤ ***Beyond Fundraising*** remains primary resource

**FORTH Now**

# FORTH Roadmap

FORTH   
A Stewardship  
Development Program



Not where you *must* go, nor *exactly* how to get there;  
instead, the routes to get from here to there, so you  
can choose the best one for your congregation.

**FORTH Now**



## **FORTH Roadmap: *Four year cycle***

### Year One: *Generous Receiving*

- Recruit leaders and create stewardship team
- Thought leader education
- Attention on “senior adults”

### Year Two: *Gifts, Call, Spiritual Vocation*

- Connect stewardship to other congregants
- Focus on membership process, financial systems, etc.
- Attention on “middle adults”

**FORTH Now**



# **FORTH Roadmap**

## Year Three: *Giving Generously*

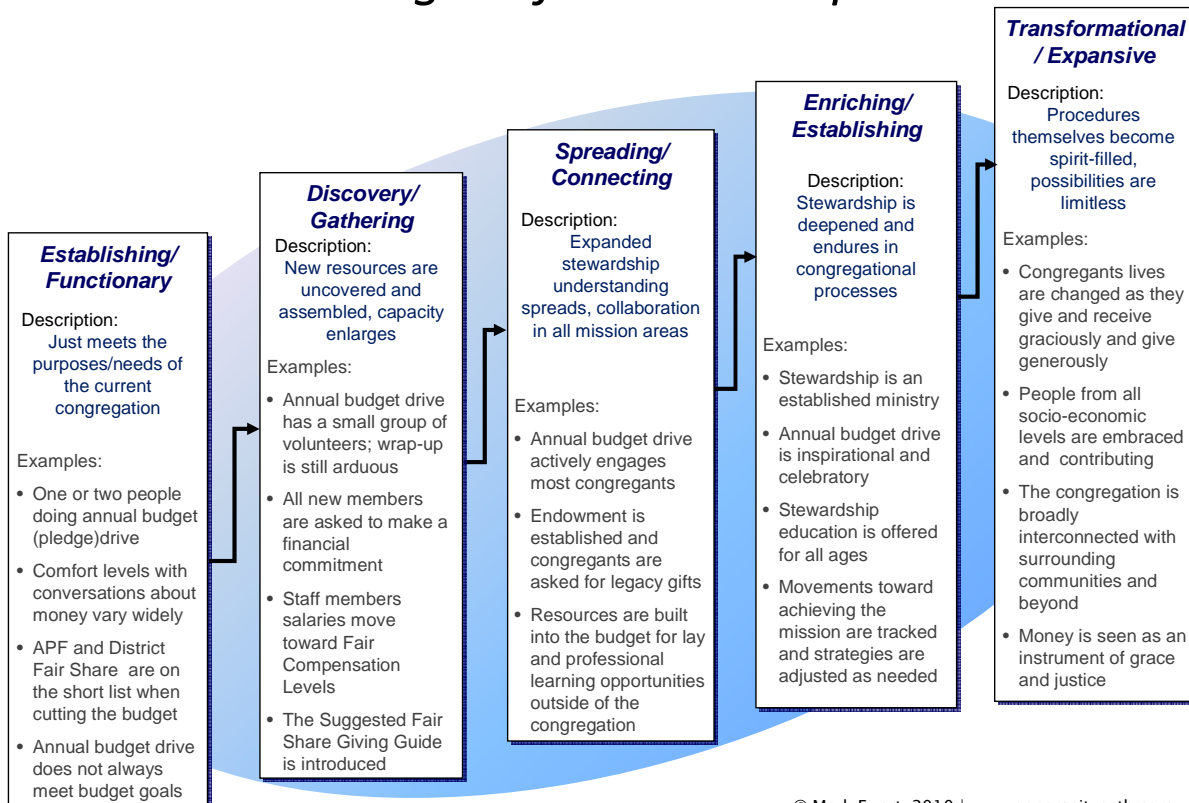
- Refine volunteer and fundraising practices
- Create development and recognition programs
- Attention on “young adults”

## Year Four: *Stewardship Sustainability*

- Develop stewardship long-range planning
- Review and revise current stewardship practices
- Attention on “youth/kids”

**FORTH Now**

# FORTH: Stages of Stewardship Culture



# The Art of Thriving

## ➤ Positive Psychology

- Humanistic and connects to spirituality
- Self-efficacy and optimism

## ➤ Appreciative Inquiry

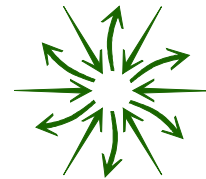
- The approach, *not* the articulated process

## ➤ Coaching Practice and Resources

- Asking questions, doing research

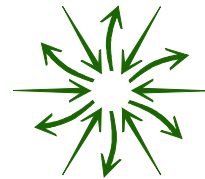
## ➤ Supporting Change

- Adaptive Leadership
- Change Management



## **Appreciative Inquiry Assumptions**

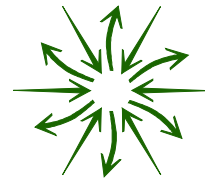
- Build on what's working well
- Our focus becomes our reality
- Carry forward best parts of the past
- Value differences
- Our language creates our reality



Adapted from *The Thin Book of Appreciative Inquiry*  
by Sue Hammond, 1996

## The FORTH Community

- Social network program: Web-based, phone, in person
- Builds collective intelligence
- Creates peer support
- Collects resources
- Tracks development and achievements



**FORTH Community**

## **FORTH Partners Entry Point**

- Self assessment to provide baseline data
- Five leaders to complete within 2 weeks
- 12 congregations randomly selected
- CSS email that includes recommendations

## **FORTH Partners Expectations**

- Use available resources
- Contribute to discussions and feedback requests
- Share achievements, learnings, and struggles
- Ask for what you need
- Submit requested updates

## **Review Workshop Goals**

1. Learn about the FORTH origins
2. Understand the FORTH roadmap
3. Learn to use the *Stages of Stewardship Culture*
4. Appreciate the importance of *The Art of Thriving*
5. Learn how to create a FORTH community

**Closing**



## Contact Information

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**Closing**