

# FORTH



## A Stewardship Development Program

**Please enter the following contact information**

First Name: \_\_\_\_\_

Last Name: \_\_\_\_\_

Work Phone: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

**Congregation Name**

\_\_\_\_\_

**Location (City, State)**

\_\_\_\_\_

**Your Current Congregational Role(s). Please select all that apply.**

- Professional religious leader
- Governing body member
- Annual budget drive team member
- Endowment committee member
- Other: \_\_\_\_\_

**Complete the following self-assessment, indicating *your* perception of the circumstances in your congregation during the past *three* years.**

<b>Congregational Culture</b>	<b>Never</b>	<b>Hardly Ever</b>	<b>Sometimes</b>	<b>Often</b>	<b>Always</b>
Past generosity and stewardship contributions are honored (archives, history documents, plaques, etc).					
Stewardship is broadly defined (more than just money) and its meaning is understood by the congregation.					
We have conversations about money and its use (both personal/family and congregational finances).					
Congregants feel welcome, regardless of their socio-economic situation.					
Stewardship policies, procedures, and materials celebrate congregants for their generosity, whether gifts are small or large.					
We have a current and vibrant mission/vision statement that is used to align all programs and activities.					
We have an intentional plan to welcome and nurture new congregants.					

<b>Membership/Polity</b>	<b>Never</b>	<b>Hardly Ever</b>	<b>Sometimes</b>	<b>Often</b>	<b>Always</b>
Congregation-wide conversations inform financial decision-making and budgeting.					
The Suggested Fair Share Giving Guide is widely used and congregants indicate when they are Fair Share givers.					
The path to membership is clear, stewardship expectations are shared, and pledges are received during the process.					
The expectations of membership are clear and include contributions of time, talent, and treasure.					
All forms of stewardship communication are caring and inspiring.					
Many congregants share responsibility for the annual budget drive; volunteers readily step up to help.					
There is little variance between annual pledges and payment of those pledges.					

<b>Ministry/Caring and Worship/Music</b>	<b>Never</b>	<b>Hardly Ever</b>	<b>Sometimes</b>	<b>Often</b>	<b>Always</b>
Stewardship is understood as part of faith development and is directly related to living our values.					
Belief in interconnectedness spurs conversations about economic justice and being in the right relationship with money.					
The worship service collection is a symbolic and spiritual time that includes engaging requests to make a financial contribution.					
All congregants, including small children, teens, young adults, the middle-aged, and seniors are asked to make stewardship commitments as they are able.					
The minister and lay leaders offer stewardship-related worship services.					
Congregants give and receive graciously and generously of their time, talents, and treasures.					
We honor congregants' legacies with planned giving/memorial programs.					

<b>Programs/ Education/ Outreach</b>	<b>Never</b>	<b>Hardly Ever</b>	<b>Sometimes</b>	<b>Often</b>	<b>Always</b>
There are year round stewardship education opportunities for congregants.					
Relationships are cultivated with economically diverse groups outside of the congregation.					
Congregational resources (time, talent, treasure) are shared with local service and social justice groups.					
Congregants with financial need feel comfortable identifying themselves and caring systems are in place with financial resources to support them.					
Significant connections are made and support is provided to local interfaith organizations.					
Congregants provide direct service to the local community and they support social justice actions.					
Parents are given information and support to help educate their children about values, money, and charitable giving.					

<b>Administration/ Facilities</b>	<b>Never</b>	<b>Hardly Ever</b>	<b>Sometimes</b>	<b>Often</b>	<b>Always</b>
Staff compensation packages are at fair compensation levels and staff members have realistic work plans.					
Membership and accounting databases are current, accurate, readily available, and used fully and efficiently.					
Reports of annual pledges are accurate, timely, and user friendly.					
The intent of the endowment is clear. The funds are well managed and the data is regularly reported to the congregation.					
The building is used by outside groups compatible with the congregational vision/mission.					
Building rentals are not relied upon as a significant source of financial support.					
Congregational income and expenses are clear and transparent.					

<b>Governance/ Leadership</b>	<b>Never</b>	<b>Hardly Ever</b>	<b>Sometimes</b>	<b>Often</b>	<b>Always</b>
The congregational makes full Fair Share contributions to the UUA Annual Program Fund and to the district.					
Governing body members contribute their Fair Share pledges to the congregation's annual budget.					
Congregational systems support emerging new lay leaders and help veteran leaders avoid burnout.					
The annual budget provides financial support for leaders to attend local, regional, and national events.					
Year round stewardship activities are closely related to the congregational mission/vision.					
Programs and activities are funded through the annual budget drive, not by separate fundraisers.					
The annual budget balances income and expenses.					