

Framework for Stewardship Decision-making

Thinking about putting an important stewardship initiative on hold during a transition?

- Building project & capital campaign
- Planned giving drive
- New vision for endowment or other investment funds
- Establishment or increase in reserves
- New approaches to the annual drive
- New fund raising efforts
- Increased social justice funding

Use this *Scoresheet* first!

Factor	Score the following High, Medium, or Low	Score
Goals and priorities	<ul style="list-style-type: none"> • Strong linkage between the initiative and congregation strategic plan and goals • No or few other high priority goals that would compete or distract 	
Leadership	<ul style="list-style-type: none"> • Trusted, respected leaders heading up the stewardship program • Strong lay leadership on the governing body and in other key positions • Solid staff in roles needed for the initiative • Key leaders with the time and energy to focus on this 	
Financial position	<ul style="list-style-type: none"> • Balanced budgets for the past 2-3 years • Percentage of budget funded by annual financial commitments (higher is better) • Manageable debt level • Fair share with the UUA APF • Fair compensation 	
Stewardship infrastructure	<ul style="list-style-type: none"> • Proven processes in place • Ease of recruiting stewardship leaders and participants • Perceived success of recent budget drives – achieving goal, positive feedback, lots of participation and enthusiasm • Success raising enough money to balance budgets and fund all needs 	
History	<ul style="list-style-type: none"> • Successful past capital campaign or other major stewardship program • Overall positive history to build on • Absence of recent major trauma or negative, divisive events 	
Relationship with money	<ul style="list-style-type: none"> • High comfort level talking about money in church • Leadership on board • Openness about money, giving, asking 	
Project value	<ul style="list-style-type: none"> • Broad support and momentum for the proposed initiative • A compelling case • This is the right time for the project 	
Donor cultivation	<ul style="list-style-type: none"> • Lead donors are lined up and ready to go • Some advance money in hand • Much advance work had been done prior to the transition 	
Energy and mood	<ul style="list-style-type: none"> • Positive, healthy, excited about the future • Few if any people pulling back, taking a wait-and-see attitude • No ongoing, unresolved conflicts • Staff and volunteer morale high 	