

# Stewardship: Building a Sustainable Future

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Presented by Patricia Infante  
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Program Manager for Congregational  
Stewardship  
MidAmerica Regional Assembly, April 6,  
2019



# Welcome!

- *Patricia Hall Infante*
- Congregational Life Staff
- Central East Region of the UUA
- *Program Manager for Stewardship in the Congregation*



Overview:  
Four  
Elements of  
Good  
Stewardship  
Practice

Year Round Education

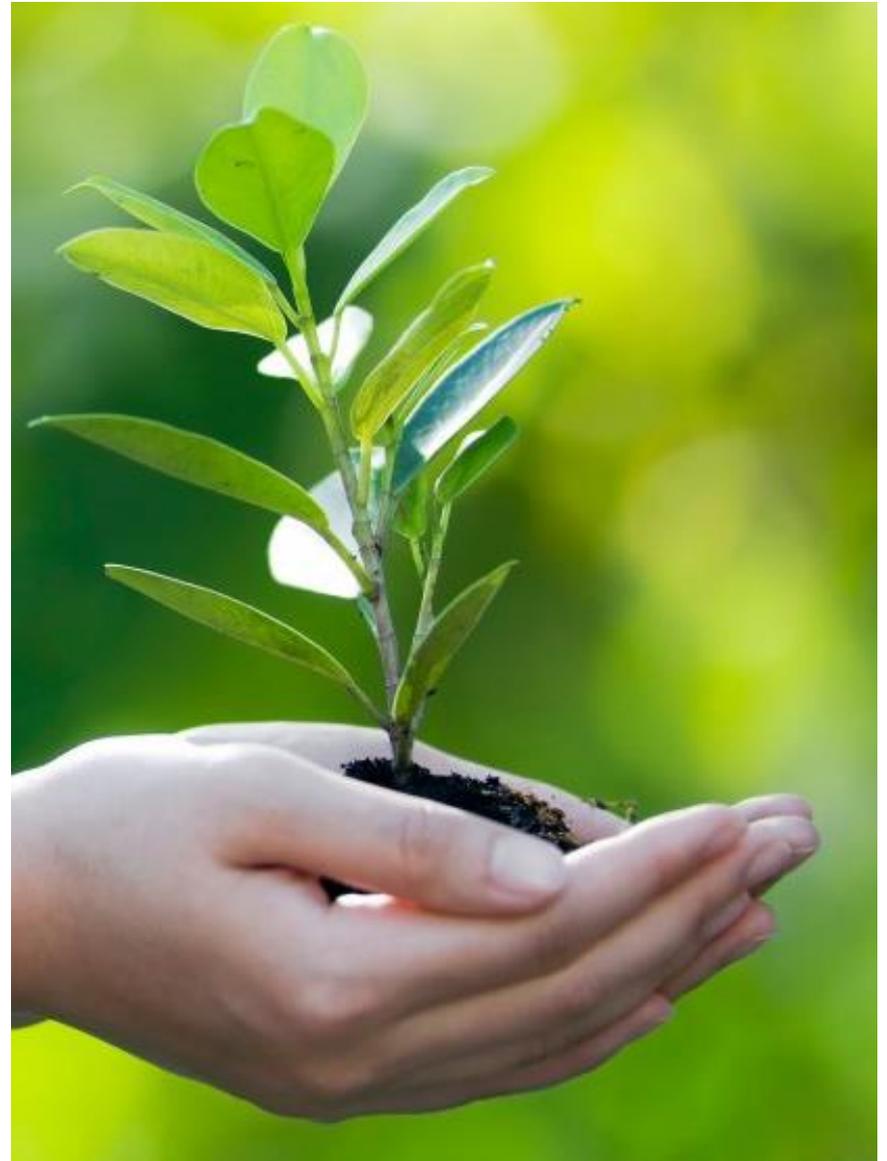
Cultivate Generosity as a  
Spiritual Practice

Include a Diverse Range of  
Ages and Identities

Sustainable Financial  
Strategies

# Stewardship

- **Stewardship** is about taking care of something we value and enabling it to grow. When we become stewards, we take responsibility and contribute our time, talent and treasure.
- **Stewardship** is not just about caring for the present, but investing in the future. We hold what we value—including our Unitarian Universalist congregations and institutions—in trust.





Why Do  
We Need  
to Talk  
About  
Money?

Who is your  
stewardship  
educator or  
thought  
leader?



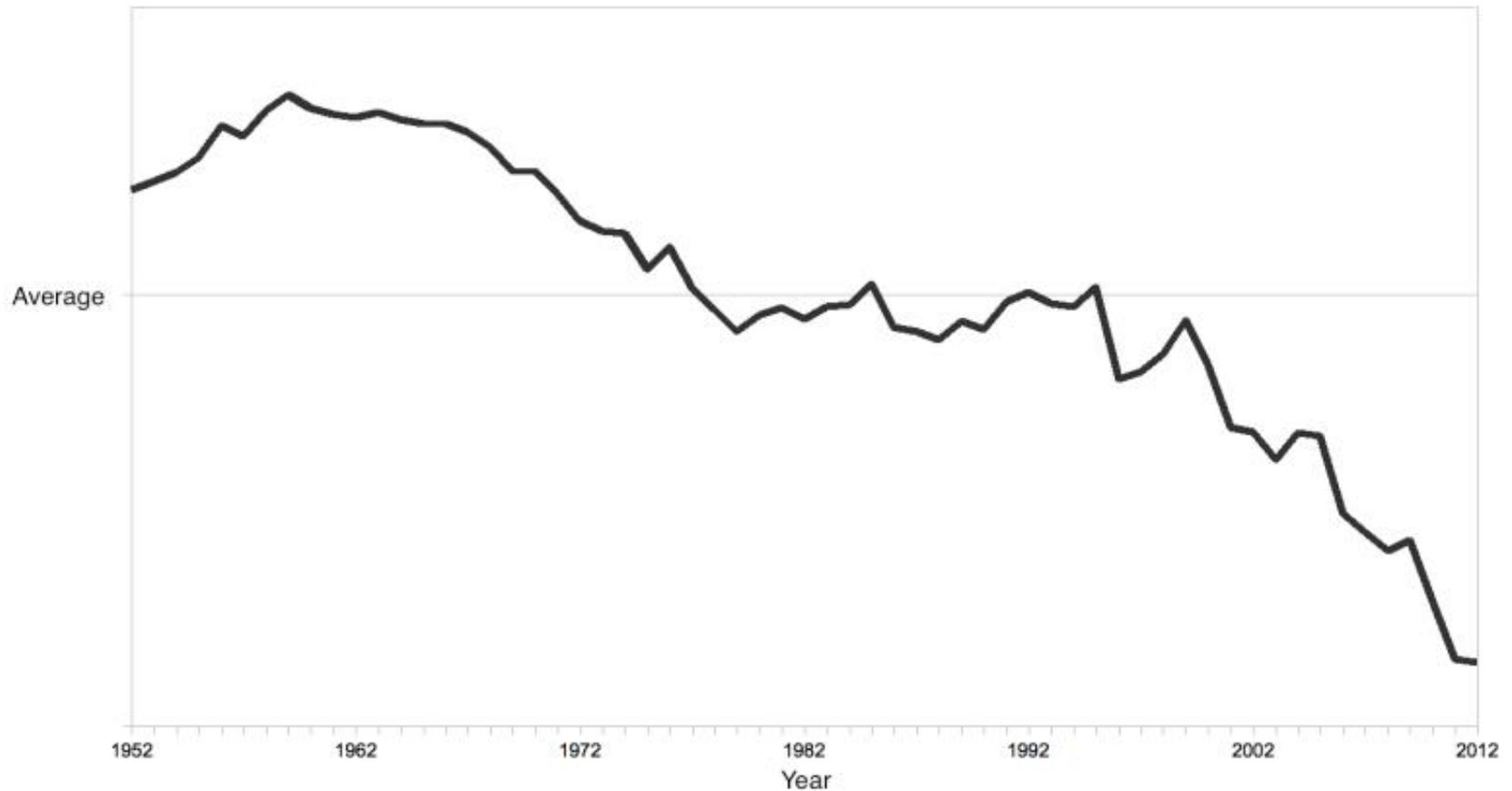
# 21<sup>st</sup> Century Stewardship Strategy is More Complex

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- Financial generosity is countercultural
- Generosity is often seen as transactional
- Era of consumerism where large donors buy influence
- Things cost more.

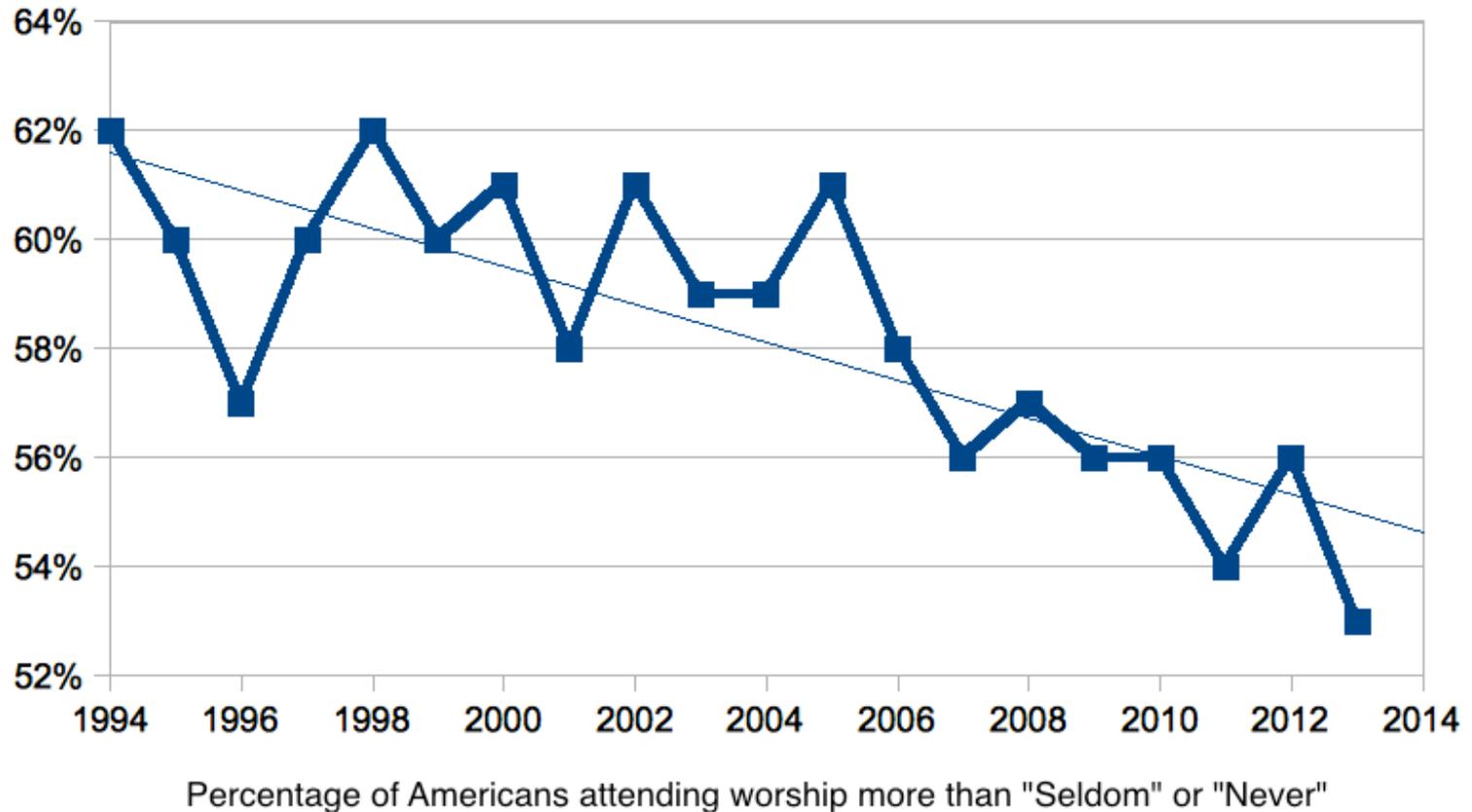


# The Great Decline: 60 years of religion in America



Graph by Corner of Church & State, a Religion News Service blog  
Source: Aggregate Religiosity Index, J. Tobin Grant. *Sociological Forum*.

# Decline of Church Attendance



Graph by Corner of Church & State, an RNS blog  
Source: Gallup



Faith Based  
Communities are  
self-supporting and  
have the added  
tension of “giving  
money to  
ourselves.”



**MATTERS**

What kind of educational ministry do you offer for givers to learn how to give?



# TOOLS for Stewardship Education

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- Preach it!
  - Stewardship Sermons on [uua.org](http://uua.org)
- Learn together
  - Wisdom Path: A Tapestry of Faith Adult Curriculum about Money
- Use the annual canvass to build relationship
  - One on one canvassing
- Have an annual calendar of stewardship education

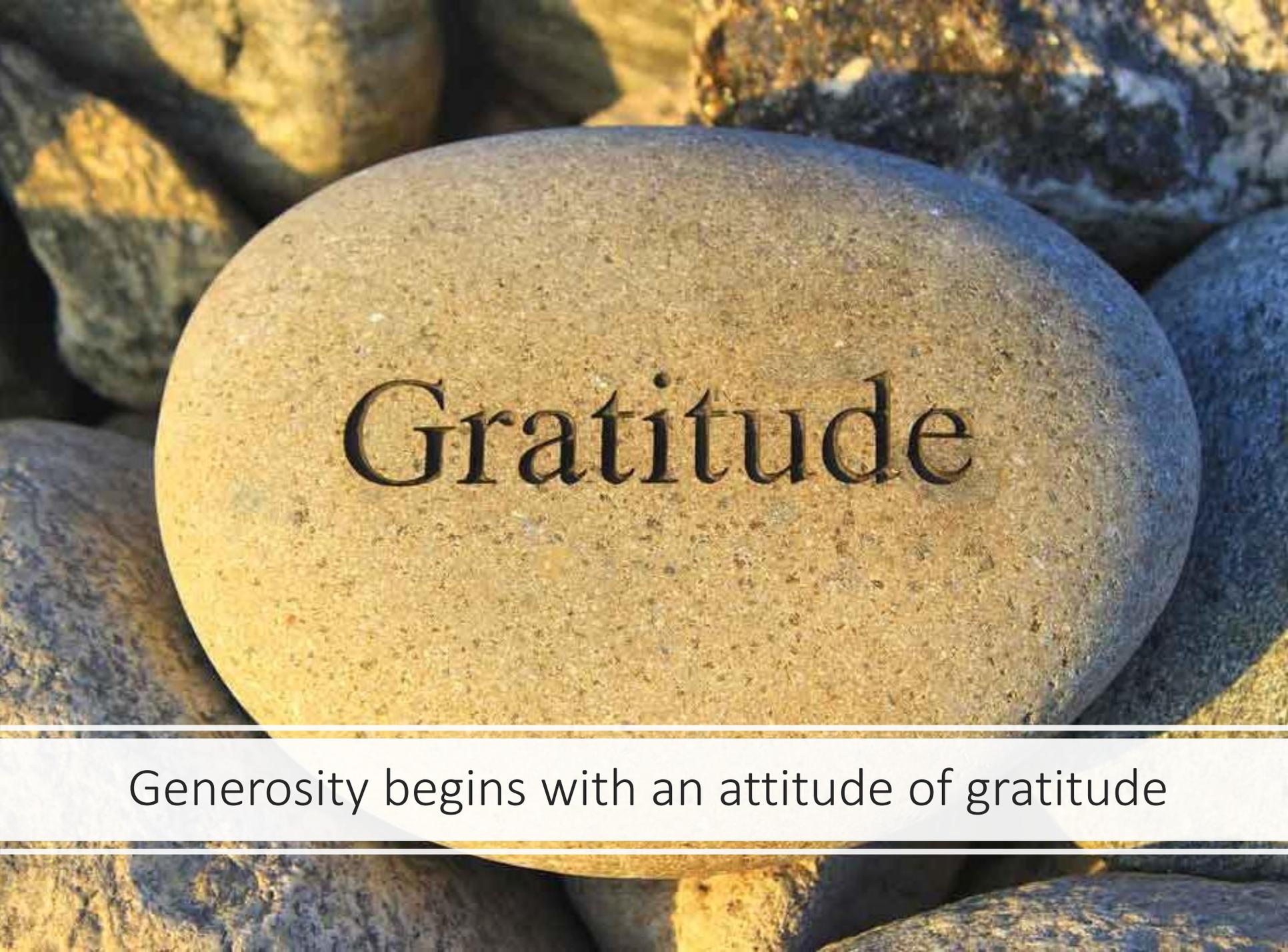




21<sup>st</sup> Century Giving



- **Generosity** is the quality of being kind and generous; the quality or fact of being plentiful or large.



Gratitude

Generosity begins with an attitude of gratitude



# A Story of Two Congregations...

- One has a “Pay-the-Bills” message that fails to integrate mission and money.
  - Money is scarce.
  - We have bills to pay if we are to survive.
  - Focus is internal and insular.
  - You must do your fair share.
- The other has a “Share-the-Vision” frame that connects money to the larger mission.
  - We may not be rich, but we have more than enough.
  - We can dare to dream and grow in faith.
  - Focus is external and global.
  - Partner and grow in faith with us.



How do you  
nurture and  
inspire generosity  
in your  
congregation?





100% USA WEX

**ONE SIZE  
DOES NOT  
FIT ALL**



For more information, please visit our website at [www.100percentusa.com](http://www.100percentusa.com)

# The Cultural Iceberg

## Surface Culture

Food  
Flags Festivals  
Fashion Holidays Music  
Performances Dances Games  
Arts & Crafts Literature Language

## Deep Culture

**Communication Styles and Rules**  
facial expressions gestures eye contact  
personal space touching  
body language tone of voice  
handling and displaying of emotion  
conversational patterns in different social situations

**Notions of:**  
courtesy and manners  
friendship leadership  
cleanliness modesty beauty

**Concepts of:**  
self time past and future  
fairness and justice  
roles related to age, sex, class, family, etc.

**Attitudes toward:**  
elders adolescents dependents  
rule expectations work authority  
cooperation vs. competition  
relationships with animals age sin death

**Approaches to:**  
religion courtship marriage raising children  
decision-making problem-solving

# Giving Trends by Generation

## THE GENERATIONS



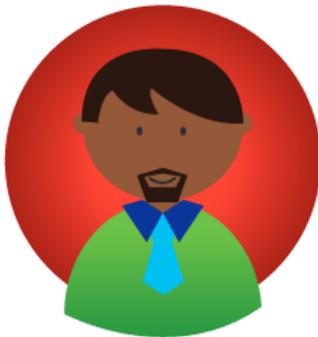
### Generation Y

- Born 1981 – 1995  
(age 18-32 as of 2013)
- Represent 11% of total giving
- 32.8 million donors in the U.S.
- 60% give
- \$481 average annual gift
- 3.3 charities supported



### Boomers

- Born 1946 – 1964  
(age 49-67 as of 2013)
- Represent 43% of total giving
- 51.0 million donors in the U.S.
- 72% give
- \$1,212 average annual gift
- 4.5 charities supported



### Generation X

- Born 1965 – 1980  
(age 33-48 as of 2013)
- Represent 20% of total giving
- 39.5 million donors in the U.S.
- 59% give
- \$732 average annual gift
- 3.9 charities supported

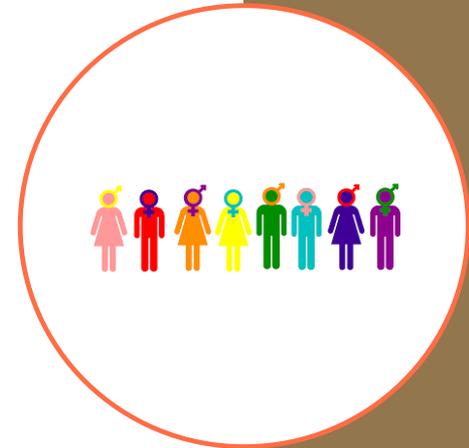


### Matures

- Born 1945 and earlier  
(age 68+ as of 2013)
- Represent 26% of total giving
- 27.1 million donors in the U.S.
- 88% give
- \$1,367 average annual gift
- 6.2 charities supported

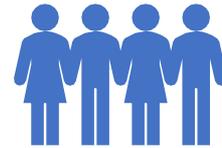
# Patterns in Giving

- Overall, higher income and higher education typically lead to higher giving.
- Men tend to give larger gifts across fewer charities.
- Women tend to give smaller gifts to a larger number of charitable organizations.
- Research shows that couples tend to give more when bargaining takes place between them, versus a sole decision maker.
- According to data from the Urban Institute, people of color have significantly higher levels of giving.



# Strategies for All Ages and Stages

- Create an inclusive narrative.
- Invite multigenerational testimony.
- Include children and youth in your stewardship activities.
- Consider generational differences in communication and engagement style.
- Create a stewardship team that is diverse in a variety of demographic areas.
- Beware of making broad assumptions about age groups, economic capacity or life stages.
- Make sure your materials thoughtfully reflect diversity in its many forms.



How might you tailor your message to different ages and stages?



# Strategies, Tools and Resources

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Stewardship is a Year Round practice.

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Focus on educating the congregation and make stories the foundation of your stewardship work.

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Ask your healthiest leaders to be part of the stewardship or canvass team. Ask them if they can articulate a “money credo” or “money theology.” Is it a good fit with your mission?

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Make stewardship part of your multigenerational ministry. Generosity is a value that families want to teach their children but may not know how.

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Seek expertise from nearby congregations or your cluster.



Nasturtium  
Fiesta Blend  
*Tropaeolum majus*

ORGANIC SEEDS

\$4.49  
10 grams

Three Pockets of Giving

# Earned Income Pocket

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- Regular Income
- Make daily decisions about how to spend
- This is usually where funds for annual giving come from
- Congregations often focus too closely on this pocket

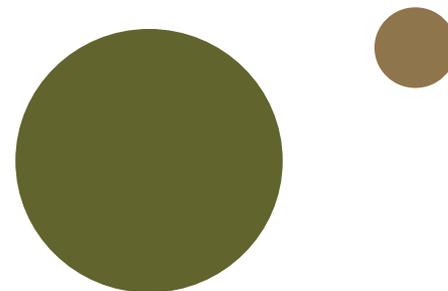


- Not part of our regular cash flow
- Typical uses are buying a home, college and retirement savings
- Assets such as
  - Real Estate, Life Insurance, Stocks, Bonds, Windfalls
- Congregations should always have a capital project list



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Capital Pocket



# Estate Pocket

- Everyone has (or should have) a will
- We have a responsibility to be good stewards of our faith, even in death.
- At some point in our lives, legacy becomes important
- The denomination has professionals to help you set up a program

*Estate*

# Financial Management

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- Systems are vital.
- Outsource when necessary.
- Technology is a helpful tool.
- Clear policies and procedures for monitoring and oversight.
- Safety protocols.



# Fair Compensation and Employee Financial Care

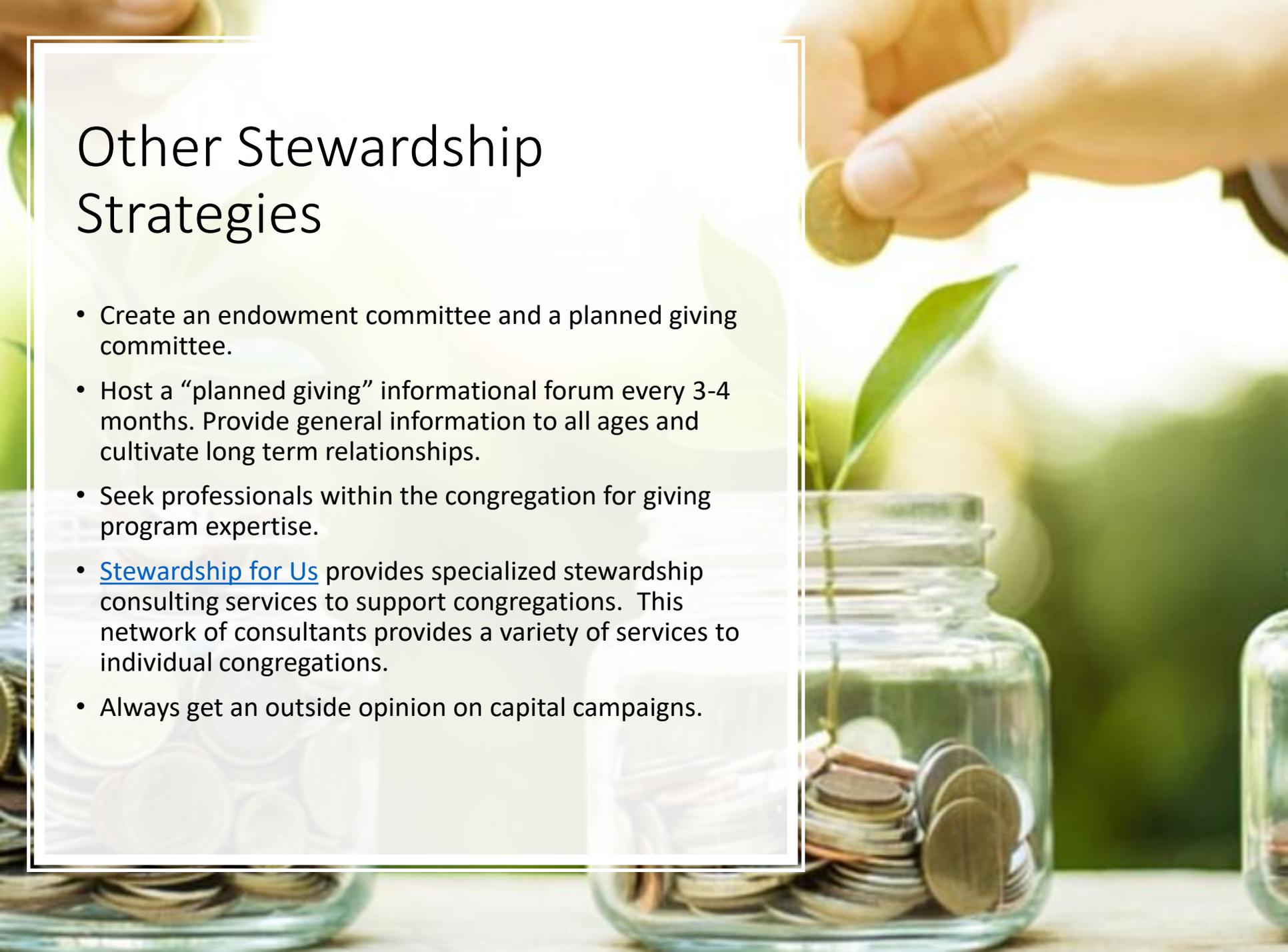
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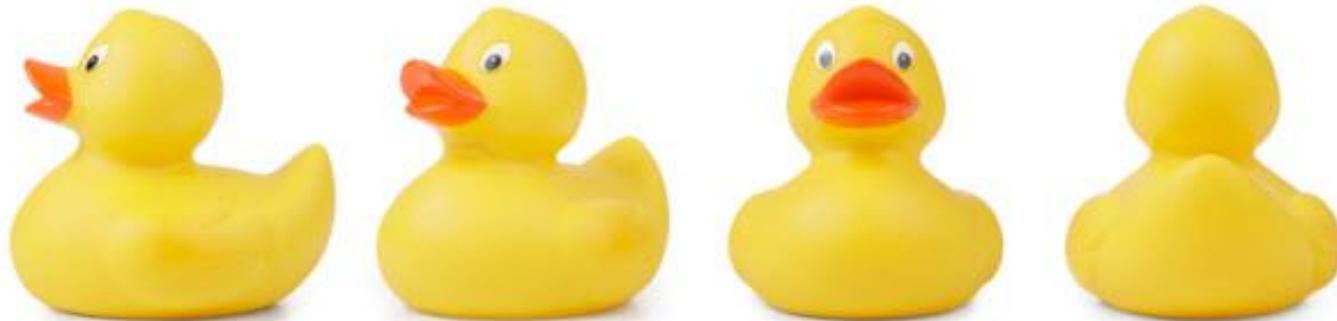
- Payroll must be a priority.
- Fair Compensation Guidelines offer specific salary ranges and recommended benefit packages for your Geographical area.
- Employee records must be safeguarded.
- Practices such as petty cash or company credit cards are recommended.
- Establish internal controls for monitoring vacation and sick time.
- Trust is vital.



# Other Stewardship Strategies

- Create an endowment committee and a planned giving committee.
- Host a “planned giving” informational forum every 3-4 months. Provide general information to all ages and cultivate long term relationships.
- Seek professionals within the congregation for giving program expertise.
- [Stewardship for Us](#) provides specialized stewardship consulting services to support congregations. This network of consultants provides a variety of services to individual congregations.
- Always get an outside opinion on capital campaigns.





Budgets are moral documents

Does your budget align with your mission?

Are there strategies  
and practices no  
longer serve you?





HOME > CONGREGATIONS & LEADERS > FINANCE & FUNDRAISING > CONGREGATIONAL FUNDRAISING

# CONGREGATIONAL FUNDRAISING AND STEWARDSHIP RESOURCES

FINANCE &  
FUNDRAISING

**Congregational  
Fundraising**

Stewardship Resources

APF Stewardship  
Resources

Consulting

Stewardship  
Development Program

Nurturing Generosity

Stewardship and fundraising undergirds everything that a faith community does and calls us into deeper connection with each other. Below is a list of recommended stewardship resources arranged by category:

- Generosity and Stewardship
- Facilities Planning
- Appreciative Inquiry

In addition, our primary recommended resource is: [Beyond  
Stewardship: A Complete Guide to Congregational Stewardship](#)

# LeaderLab on uua.org

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## [Planning Your Pledge Drive - LATE!](#)

Your pledge drive needs to happen soon, but it is late and you still don't have a drive leader, or maybe just got one in place! We will present 11th-hour strategies and learn from each other's experiences.

By Southern Region of the UUA, Stewardship for Us | 3/13/2019



## [Stewardship Overview for Congregational Presidents](#)

A supportive board is essential for a successful stewardship campaign. This overview helps congregational boards understand what is needed.

By William Clontz, Southern Region of the UUA, Stewardship for Us | 10/4/2018



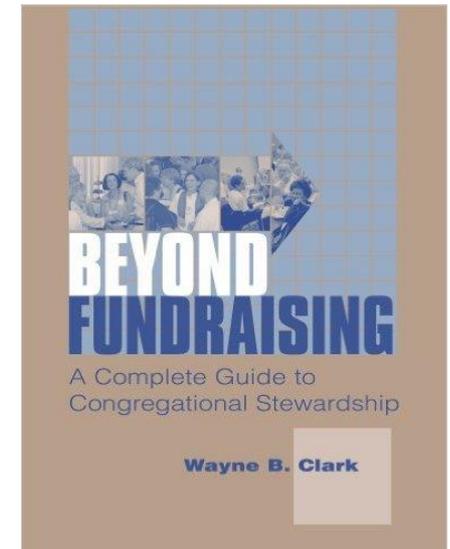
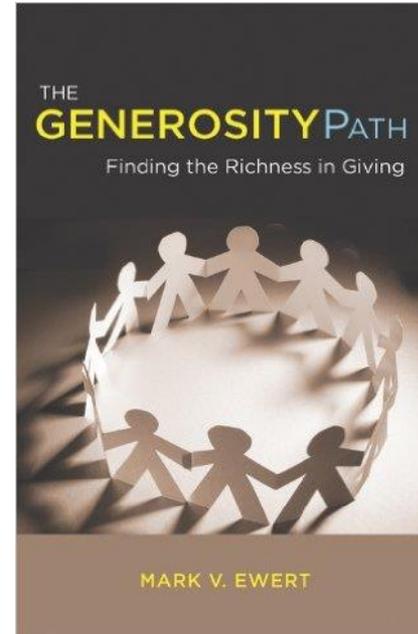
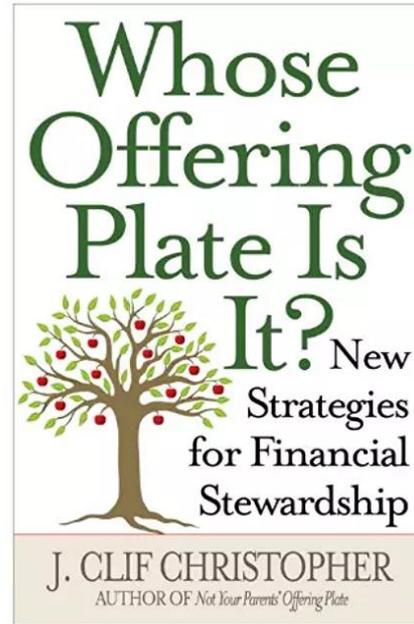
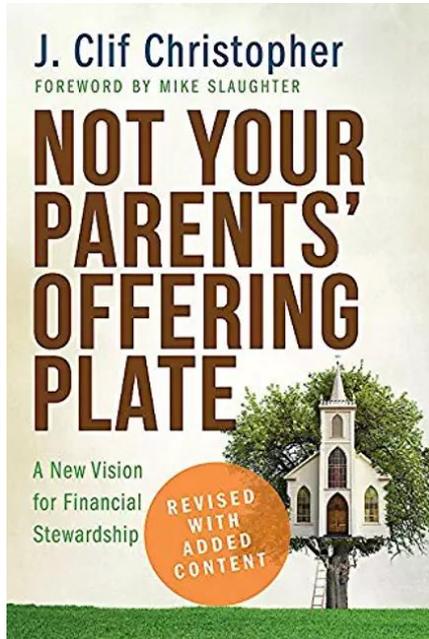
## [Stewardship Re-envisioned: Moving Beyond the Pledge Drive](#)

This recorded workshop explores evolving

**Important Note:** LeaderLab is a Learning Community! We welcome your feedback on the evolving resources (we have the comments open) and have a **5 star rating system** available on each resource for your use. We especially appreciate feedback on how we can improve resources as part of our commitment to dismantling white supremacy.

## SEARCH OPTIONS

- tag/category, such as "board of trustees," covenant or "membership growth & outreach"



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## The Mzimu Project: Education with Spirit

In rural Malawi there is a lack of early development education and opportunities. In order to address this issue in the most holistic and sustaining way, the organization Women's Build and Unopose a



## New flooring for sanctuary!

Revitalizing Sacred Space! – new floor Continue reading →

**\$85**  
GOAL

**\$1**  
FUNDED

**51**  
DAYS TO GO



## Chicago UU Young Adults Putting Faith into Action

Chicago Chalice Connection is a ministry of Unitarian Universalist young adults in the Chicagoland area joining in supportive community to cultivate spiritual/religious growth and engage in local struggles for justice



## Refugee Settlement Concert Support

A group of young professional musicians are giving a concert in CT on November 21 at 7:30pm to raise funds for settling refugees in Hartford County. Information on the live stream and how to donation can be found within

Questions? Contact your regional staff!



- What kind of educational ministry do you offer for givers to learn how to give?
- How is gratitude expressed for the gifts and pledges you receive?
- Do you tailor your message to different ages and stages?
- What strategies and practices no longer serve you?



A wooden signpost with two signs. The top sign is an arrow pointing right and contains the word 'QUESTIONS'. The bottom sign is a simple rectangular board and contains the word 'ANSWERS'. The signpost is made of weathered wood and is set against a bright blue sky with scattered white clouds.

**QUESTIONS**

**ANSWERS**



**Tell me, what is it  
you plan to do  
with your one  
wild and precious  
life?**

**Mary Oliver**