

Beyond Fundraising

with Wayne B. Clark

Unitarian Universalist Association of Congregations
Joseph Priestley District
Cedar Lane UU Church
Bethesda, Maryland

Saturday October 24, 2009
10:00 AM to 4:00 PM

Accommodations?

Workshop Goals

1. Appreciative Inquiry and stewardship
2. Stewardship in difficult economic times
3. Successful annual budget drives
4. New stewardship development program
5. Stuff to bring home

Burning Questions

Beyond Fundraising

- Fundraising is designed to raise money for an annual budget drive or a capital campaign.
- Stewardship is the growing, nurturing, promoting, and building of gifts, call, and spiritual vocation.
- Good stewardship involves raising money, but raising money must be nestled under the umbrella of congregational mission.

Appreciative Inquiry

“A faith community is not a problem to be fixed but a mystery to be embraced.”

David L. Cooperrider

“While traditional problem solving separates, dissects, and pries apart, AI generates affirming images that pull people together.”

Wayne B. Clark

Appreciative Inquiry

“There is no power greater than a community discovering what it cares about. Ask ‘What’s possible?’ not ‘What’s wrong?’ Keep asking . . . Be brave enough to start a conversation that matters.”

Margaret J. Wheatley

Turning to One Another

10 Steps to Successful Stewardship in Difficult Economic Times

1. Share research
2. Strategic plan
3. Vision + mission
4. Program budgeting
5. Open + accountable
6. Appreciative Inquiry
7. Ask!
8. Electronic giving
9. Mission expansion
10. Be pastoral

http://www.uua.org/documents/congservices/stewardship/tough_economy_giving.pdf

Components of Successful Annual Budget Drives

- The more personal the better
- Recruit lots of people
- Make a compelling case
- Use program budget process
- Focus on suggested fair share giving guide
- Use testimonials
- Develop an attractive brochure
- Carefully implement follow-up

Four ABD Techniques

1. Stewardship conversations
2. Commitment Sunday
3. Cottage meetings
4. Congregational dinner

Stewardship Conversations

1. Recruiting visiting stewards
2. Orientation workshops
3. Leadership reception
4. Fellowship event
5. Follow-up

But what if we don't reach our goal?

FORTH

- To emphasize connection between spiritual stewardship and congregational mission
- To provide resources for current programs and ministries
- To deepen commitment to future programs and ministries

Five Components of FORTH

1. Stewardship education
2. Joyful giving
3. Ministry and good works
4. Annual budget drive
5. Planned giving

FORTH Action Plan

Component	Activity	Activity	Activity	Activity
Stewardship Education				
Joyful Giving				
Ministry and Good Works				
Annual Budget Drive				
Planned Giving				

Stewardship Education

Develop formal programs and informal opportunities to expand congregation's understanding of stewardship

- Teach ways to accept gifts
- Offer a money management workshop
- Sunday service: Gracious giving

Joyful Giving

Create a plan to grow the giving of gifts, call, and spiritual vocation

- Curriculum to teach stewardship of self, family, community, and congregation
- Focus on protecting existing resources and nurturing growth
- www.uua.org/re/curriculum/stewardguide

Ministry and Good Works

- Teach an Appreciative Inquiry approach to spreading the good news
- Create a Sunday order of service series of inserts
- Highlight current programs and ministries
- Acknowledge all annual budget drive volunteers
- Celebrate completion of the budget drive

Annual Budget Drive

- Conduct orientation workshops for visiting stewards
- Schedule as many stewardship conversations as possible
- Supplement (and follow-up) with phone calls, e-mails, and letters
- Conduct a closeout meeting with annual budget drive leaders

Planned Giving

1. Enabling resolutions
2. Committee structure
3. Mission statement
4. Endowment document
5. Define endowment fund

Forward Through the Ages (FORTH)

Three-year Demonstration Project
July 2006-June 2009

Asheville, NC	UU Church of Asheville	575
Boca Raton, FL	UU Fellowship of Boca Raton	200
Chandler, AZ	Valley UU Church	365
Grand Rapids, MI	All Souls Community Church	150
Milford, NH	UU Congregation in Milford	210
Vancouver, WA	UU Church	250
Washington, DC	All Souls Unitarian	770

FORTH

Preliminary Findings

- Committed leadership
- Multigenerational education
- New member orientation
- Vocabulary
- Appreciative Inquiry

More Findings

- Intentional recruitment
- Mentoring program
- External consultant to shepherd process
- Slow culture shift
- Adapt to fit their congregation

Small Group Work

What can we bring home to initiate change
that will be most helpful to our
congregation?

Review Workshop Goals

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Contact Information

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