

## **Stewardship Committee Procedures**

### **Mission**

Creating a culture of giving that funds the mission and vision of the Unitarian Universalist Fellowship of Ames.

### **Charges**

- Emphasize and elevate financial giving as a spiritual and ethical practice.
- Works with the Board, the Endowment Committees, and all committees.
- Be the primary facilitator/coordinator of fundraising activities and events within the Fellowship
- Develop fundraising guidelines.
- Lead the annual giving campaign.
- Plan and implement fundraising events for the operating fund.
- Partner with the board in feasibility assessments and implementation of capital campaigns.
- Year round communication with membership about financial issues.
- Develop and implement donor recognition and appreciation opportunities.

### **Ongoing Goals**

- Increase giving to the operating fund by encouraging members to give according to the fair share guidelines.
- Assist the Endowment Committee in increasing member awareness and participation with the endowment.
- Provide consultation and support to fundraising groups within the Fellowship. Prevent date conflicts or over asking of members by various fund raising or goods- selling groups within the Fellowship.

### **Short term goal(s)**

- Develop and implement donor recognition and appreciation opportunities.
- Work with other committees to develop policy on handling memorial and other gifts to the Fellowship.

### **Committee Structure**

Chair Duties: The Chair will call regular meetings, set the agenda, communicate regularly with committee members, be a liaison to the Endowment Committees and write the annual report. Communicate with membership through a variety of modalities. The chair will monitor the committee budget.

Requirements to be Chair:

The Chair of the committee will be a member of the UUFA. Ideally, the incoming chair would be selected and mentored a year prior to being the chair and be called the vice chair. The chair must be comfortable asking for money and discussing money with members. The past chair can continue as a committee member. The chair serves under the supervision of the board and can be removed by the board. If the committee is having difficulty finding a chair, the board may assist in appointing a chair, otherwise, the chair will be selected by the committee.

Access to Financial Giving Information: The chair, vice chair and projects coordinator will have access to the detailed pledging information. Confidentiality of pledging information will be maintained.

Committee Composition:

The Stewardship area would be best served by a committee of 8 people, however can function with fewer. All committee members will work to recruit new members as needed. A liaison from the board will be appointed by the congregational President and will be a full member of the committee. The liaison will represent Stewardship activities and perspectives to the board when appropriate. The Chair may also send reports or make presentations to the board. The committee may recruit individuals outside the committee to be leaders of certain events and they are supervised by committee members.

Committee Member Requirements: Except for the chair, committee members are not required to be members of the UUFA, but must be pledging to the budget (a pledging friend). Committee members will be expected to participate in a substantial way in the annual giving campaign through their volunteer efforts. If a committee member does not attend meetings or is not in communication with the chair about their participation for 3 months, that person will be removed from the committee.

Terms of Service on the Committee: Committee members would be expected to serve a one year term at a minimum and are welcome to continue beyond that.

Committee Meetings: Committee meetings will include approving the agenda, the minutes, and doing committee business. The note taking function at meetings will be rotated among committee members. Each year, a covenant will be developed and can be revised throughout the year as or if needed. Robert's Rules of Order will be utilized when it is necessary to vote. Voting will occur about policy and on fundraising requests. Minutes will be available to fellowship membership.

Annual Giving Campaign: The end of the giving campaign will be timed so that the Board will have two monthly meetings to develop a budget before the annual congregational meeting. This committee will communicate financial giving progress during the campaign with the Finance Committee. This committee will collaborate with the Endowment Acquisitions and Disbursement Committee to promote the Endowment during this campaign.

Sunday Morning Collections/Offertory: The Social Justice Ministry Committee selects recipients for the collection split of Sunday morning fund collections. The Board collects the funds at services and does the accounting with the office staff.

Administrative Assistance: The projects coordinator will receive and record pledges. The projects coordinator assists with the brochure and mailing production process. The projects coordinator will attend committee meetings when needed and available.

### **Procedures regarding UUFA members**

A variety of fundraising methods will be used for the annual campaign and the committee will decide each year about timing and method of fundraising.

If a member tells a Stewardship volunteer that they no longer want to be a member, the volunteer will communicate this to the chair, who will communicate this to the membership services committee chair, for that committee to follow up to be certain the person wants to rescind membership.

If a volunteer learns that a member wants to stay a member and has a financial hardship, the volunteer is to share that person's name with the chair and the minister for follow up support and decision making about status.

If a member does not respond to repeated contacts to pledge and has not made a pledge for the fiscal year, that information will be communicated to the membership committee and the minister.

### **Procedures regarding the coordination of fundraising activities outside the annual fund drive**

One charge of the committee is to serve as facilitator/coordinator of fundraising activities at the Fellowship. This role is important for several reasons, including:

- To ensure all fundraising efforts are tied to the UUFA mission
- To assist in developing appropriate timelines for efforts, ensuring they do not overlap and create an environment whereby the congregation feels "over-solicited" for various causes
- To advise on how to attain maximum fundraising results with minimal effort.

Over the past year, the committee has realized that many fundraising efforts do occur throughout the year, and we remain ever-sensitive to the congregation feeling over-solicited. To help clarify appropriate fundraising activities at the UUFA, the stewardship committee recommends the following guidelines for consideration of fundraising activities. To assist the committee in coordinating fundraising the following information would be helpful:

- The fundraising planning sheet needs to originate from the UUFA staff or a standing committee of the Fellowship.
- If on rare occasions a funding request is approved by the board prior to stewardship being notified, then the timing of that fundraising needs to be coordinated with the office and the stewardship chair.
- Requests are UUFA mission-based
- Requests need to be submitted in an email to the stewardship chair and to the office preferably 30 days prior to the planned solicitation timeframe. The request should include the purpose, how the event supports the mission and vision of the Fellowship, timing and amount of money hoped to raise. A “Fundraising Planning Sheet for the UUFA” form is available from the UUFA office. You may also request that a copy you can print out be sent to you by email or US mail.
- If the fundraising is for a charitable event that is annual (e.g., the Alternative Gift Market), then notification of the planned event would be sent to the stewardship chair and office for coordination and communication purposes.
- Send requests to [stewardship@uufames.org](mailto:stewardship@uufames.org) or the building address designated for Stewardship.