

**Painless Person-to-Person  
Annual Budget Drive Workshop  
with  
Wayne B. Clark**

**Sponsored by Mass Bay District**

**March 11, 2006**

**9:00 am – 2:00 pm**

**Summerfield Suites Waltham, MA**

**“There are three irrefutable rules that will assure your success in fundraising. Unfortunately, no one has ever discovered what they are.” —John Russell**

**©Beyond Fuss and Beg:  
Stewardship for Faith Communities  
By Wayne B. Clark**

- **Moving Toward the Reality of Abundance**
- **Learning to Receive**
- **Dispelling Myths about Giving**
- **Making the Case**
- **“Searching for the Future”**
- **Orientation Workshop for Stewards**
- **“Forward Through the Ages”**

# **Stewardship Conversation Strengths**

- **Deepens relationships**
- **Questions, answers, and feedback**
- **Confidential, informal setting**
- **High financial commitment**
- **Everyone takes responsibility**
- **Cost effective**
- **Personal growth/Talking about money**

# **Stewardship Conversation Challenges**

- **Committed corps of volunteers**
- **Lots of time and energy**
- **Mature and sensitive visiting stewards**
- **Guidance by a consultant**

# **Commitment Sunday**

## **Strengths**

- **Motivational Speaker**
- **Visible**
- **Economical**
- **Fairly easy to implement**

## **Challenges**

- **Service attendance**
- **Lacking in Spirituality**
- **Higher slippage rate**

# **Cottage Meetings**

## **Strengths**

- **Community and fellowship**
- **Low-key and informal**
- **Comfortable for new members**
- **Organization options**

## **Challenges**

- **Limited ownership**
- **Negative voices could hijack**
- **Best for small congregations**

# **Annual Congregational Dinner**

## **Strengths**

- **The event is special**
- **A night out together**
- **Many commitments received**
- **Consistent message**

## **Challenges**

- **Can be expensive**
- **Needs high attendance**
- **Social setting could obscure stewardship**

# **Other Approaches**

- **Faith Promise**
- **Pony Express**
- **Telephone Appeal**
- **Direct Mail**

# **Leadership Team**

- **Budget Drive Chair**
- **Leadership Gifts Chair**
- **General Gifts Chair**
- **Fellowship Event Chair**
- **Publicity Chair**
- **Publications Chair (see next slide)**
- **Follow-up Chair**
- **Budget Drive Treasurer**

# **Publications Team**

## **Three documents**

- 1. The case statement**
- 2. The brochure**
- 3. The financial commitment form**

# **Case Statement**

- **Connection between case and mission?**
- **Enhance programs and ministries?**
- **What will be different?**
- **Spiritual expectations met?**
- **Why me?**

# **Brochure**

- **Complete contact information**
- **Case statement**
- **Mission statement**
- **Suggested fair share giving guide**
- **Two pie charts**

# **Financial Commitment Form**

## **Don't forget**

- **Full church contact information**
- **Payment sequence**
- **Fair share commitment?**
- **List your name as a fair share donor?**
- **Exit statement**

# **Suggested Fair-Share Giving Guide**

- 1. Supporter**
- 2. Sustainer**
- 3. Visionary**
- 4. Full Tither**

# **Annual Budget Drive Calendar**

## **First month**

- **Recruit all leadership team members**
- **Consultant's first visit**
- **Develop calendar**
- **Create communication strategy**
- **Develop program budget**

# **Annual Budget Drive Calendar**

## **Second Month**

- **Approve program budget**
- **Draft a case statement**
- **Plan fellowship event**
- **Create donor contact list**

# **Annual Budget Drive Calendar**

## **Third Month**

- **Consultant's second visit**
- **Plan leadership reception**
- **Recruit group leaders**
- **Create financial commitment form**
- **First letter (outline process/alumni/local)**

# **Annual Budget Drive Calendar**

## **Fourth Month**

- **Consultant's third visit**
- **Recruit table hosts and hostesses**
- **Approve case statement**
- **Recruit visiting stewards**
- **Second letter (personal conversations)**
- **First stewardship sermon**

# **Annual Budget Drive Calendar**

## **Fifth Month**

- **Share draft brochure with consultant**
- **Third letter (mission & stewardship)**
- **Second stewardship sermon**

# **Annual Budget Drive Calendar**

## **Sixth Month**

- **Match visiting stewards with donors**
- **Consultant conducts orientation workshops**
- **Hold leadership reception and fellowship event**
- **Third sermon**
- **Conduct all stewardship conversations**
- **Collect financial commitment forms**

# **Annual Budget Drive Calendar**

## **Seventh Month**

- **Pursue unreturned commitment forms**
- **Compute total money committed**
- **Hold close-out meeting**
- **Write all final reports**
- **Celebrate!**

# **Orientation Workshop for Visiting Stewards**

- **Understanding the role**
- **Maintaining dignity**
- **Practicing in a safe environment**
- **Having some fun**

# **Guide for the Visiting Steward**

- 1. The preliminaries**
- 2. Scheduling the stewardship conversation**
- 3. Conducting the conversation**
  - a. Share your personal story**
  - b. Listen to their story**
  - c. Ask for their financial commitment**
  - d. Thank them for their commitment**
- 4. The follow-up**

**Wayne B. Clark**

**wclark@uua.org**

**(207) 829-4550**

**[www.uua.org/cde/fundraising](http://www.uua.org/cde/fundraising)**