

**UUFSD Policy and Procedure Document****Policy ID: 420****Title: Stewardship Commission**

Date Approved: November 13, 2011 by the Board of Directors

**Purpose**

The Stewardship Commission (herein called "Stewardship") is responsible for planning and overseeing the activities that raise the funds necessary to support the Fellowship. All fundraising activities fall under the oversight of the Stewardship Commission, whether initiated by Stewardship, or by another group or committee.

Fundraising falls into these general categories:

- 1) The annual pledge drive of members, which is the principal source of funding for Fellowship operations.
- 2) Other activities planned and managed by Stewardship that are generally held annually, such as the auction.
- 3) One-time events/events planned by groups other than Stewardship. These may be held to benefit the Fellowship general funds, or may be specific to one group or program.
- 4) Sunday luncheons

Stewardship is also responsible for the annual "clean up" of the membership roster. For details, refer to the bylaws (Section 3) and Policy and Procedures document 230-Inactive Members.

**Policy**

Members of Stewardship shall have a history demonstrating commitments of time and financial support to the Fellowship. As much as possible, the members shall also represent the social diversity of the Fellowship.

Minimum requirements for candidates for Chairperson: any candidate for chairing Stewardship should have had at least one year of recent experience on the Stewardship Committee.

**Procedure**

Stewardship should strive to maintain between 5 and 10 members, who meet as needed. This is generally monthly, with extra meetings during the pledge drive season (January through May of each year).

***Pledge Drive:***

In planning and executing the pledge drive, members should be aware of the following aspects, each of which should have a primary person responsible:

- Planning the method for the pledge drive itself (options include a "Pledge Sunday" service, home parties, parties at the Fellowship, phone drives, and face-to-face meetings). A main strategy should be selected early in the planning for the annual pledge drive. The main elements of the plan should be decided upon by the end of January each year.
- Project Planning: keeping a detailed calendar of tasks, with dates and responsibilities assigned.

- Written Communications: designing and producing the pledge brochure, pledge card, letters to members, thank you letters, newsletter articles, etc.
- Verbal Communications: addressing the congregation during services, possibly having a "pledge table" after services, etc.
- Pledge Tracking and Follow-up: After the initial pledge event, following up with those who have not yet pledged and working with the Office Administrator to track pledges that remain outstanding and contacting those members who have not yet indicated their pledge amount. This effort will continue until all members have indicated their pledge intentions or have failed to respond to repeated attempts at contact.
- After making reasonable efforts to contact and get a response, the Stewardship Chair will submit names of members who have not made a pledge by July 1 (the start of the new church year) to the church administrator who will follow the procedure outlined in the bylaws.

### ***Other Fundraising Activities***

Planning and executing other fundraising activities will be similar, but will vary depending upon the type of event and whether another group is involved. For example, if the Religious Education or Music Committee chooses to have a fundraiser, they would need the approval of the event by Stewardship, but most of the actual activities (project planning, communications, etc.) will most likely be performed by the group that initiated the event.

Events proposed by Fellowship Groups for specific fundraising purposes other than the general support of the Fellowship must submit their proposal for review and approval. Stewardship will ensure the following criteria are met: No schedule conflict with other events. Designated Point of Contact (POC) for group that will report progress to Stewardship as required. Method of record keeping will be sufficient for financial review. Fundraiser purpose will be consistent with non-profit regulations governing the Fellowship. Fundraiser will be consistent with the Fellowship's mission.

Events proposed by Fellowship Groups for fundraising purposes other than the general support of the Fellowship will be charged a fee equal to 10% of the event's net profit to a maximum of \$250.00. The fees collected will be deposited in the Fellowship's general fund. Exceptions may occur subject to approval by the Board of Directors.

Fellowship Committees may plan and execute individual charitable and/or social action solicitations of UU members, commonly known as "Asks". They include, but are not limited to the Worship Committee's 12 Generosity Sunday's and special situations recognized by the Social Action Committee.

It is critical that any group planning a fundraising activity work with the Treasurer/Finance Committee to ensure proper accounting of cash, and to define (in advance) which account numbers will be used to record all transactions. Each fundraising group will be responsible for tracking all expenditures and proceeds.

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### ***Sunday Luncheons***

The Stewardship Commission shall appoint a Luncheon chairperson, who will be in charge of the overall program (refer to Policy ID 421).