

**UUFSD Policy and Procedure Document****Policy ID: 420****Title: Stewardship Steering Committee**

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

Revision approved by the Board of Directors: September 18, 2022

**Purpose**

The Stewardship Steering Committee (herein called "Stewardship") endeavors to foster generosity and is responsible for planning and overseeing the activities and processes that raise the funds necessary to support the Fellowship. All fundraising activities, with the exception of Generosity Sundays, fall under the oversight of Stewardship 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 overseen by Stewardship that are generally held annually, such as the auction, and Dining for Dollars.
- 3) Online donations
- 4) Solicitation for donations for one-time special items.
- 5) Events planned by groups other than Stewardship. These may be held to benefit the Fellowship general funds, a specific Fellowship group or program, or an outside non-profit group or program.

Stewardship is also responsible for the annual review of the pledge roster. For details, refer to Policy and Procedures 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.

Stewardship should strive to maintain between 5 and 10 members, who meet as needed. They generally meet monthly.

**Procedure****Pledge Drive**

Starting in 2019, the UUFSD began Continuous Pledging, where pledge amounts from the previous year may be automatically entered for the following year, unless otherwise specified by the pledger, or if the pledger is in arrears. With continuous pledging, there is no way to determine if a person intends to stop pledging in the

next fiscal year unless they have so notified UUFSD. For purposes of budget planning, it then becomes important to follow-up with anyone who has not paid any of their current year pledge, or does not have a pledge on record. Starting in April, the Treasurer will report to Stewardship those members who have no pledge on record, or have not paid any of their current year's pledge. The Stewardship Chair, or designee, will contact all members and pledging friends to inquire about their pledge intentions. If the member does not intend to pledge, or cannot be reached for their answer, this will be communicated to the Membership Chair and Congregational Administrator to remove the member from Voting Member status (unless a waiver has been granted by the Minister or the Board President).

With input from the Board and Treasurer on future financial needs, the Pledge Drive will focus on communicating to the congregation where their pledges are going, and what is needed for salaries and growth of our programs for the coming year. This may take the form of brochures, newsletter articles, and member testimonials. This will ideally occur in early spring, as any changes in pledging will inform the next year's budget.

At the end of the fiscal year, the Treasurer will provide an updated list of members who have not paid a pledge in the last fiscal year to the Stewardship Chair, Membership Chair, Board President and Minister for review. The Membership chair will send each member on the list a notice of impending change of membership status at the beginning of the new fiscal year. If the minimum contribution or pledge is not received within 30 days, the member's status changes automatically from Voting to Inactive.

### **General Fundraising Events**

Stewardship will plan events to fulfill the fundraising goal set in the annual budget. Stewardship will delineate tasks and enlist Fellowship members to execute these events. Examples of large events are the auction and art fair.

### **Fundraising Activities by Committees and Other UUFSD Groups**

Planning and executing other fundraising activities 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. A form for this purpose is available on the UUFSD website.

Stewardship will ensure the following criteria are met:

- The Fundraiser form officially requesting the fundraiser has been submitted (<https://uufsd.org/fundraiser-request-form/>) and all required information supplied.
- 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.

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 works 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.

### **Fundraising Budget**

Stewardship will make recommendations to the Board of Directors regarding the Fundraising Income goal for the next fiscal year, and make a request for a Fundraising Budget to cover event and publication expenses.