

UCE Integrated Stewardship Committee Job Description (Revised September 2015)

Vision

UCE will integrate its stewardship activities in order to leverage its resources more efficiently. An integrated stewardship approach will consider how, and how often, members are solicited for the internal and external obligations enabling greater generosity and outreach. Leaders have an obligation to understand and communicate the financial needs of the Church. The ISC will support the following values:

- **Engagement:** to believe in what we can together become
- **Community Giving:** shifting from a culture of scarcity to a culture of abundance
- **Education:** teaching the congregation the complete mission of UCE and the case for the budget
- **Enthusiasm:** Generate a sense of anticipation and eagerness to engage with the members
- **Excellent campaign management:** Defined timeline and tasks for the annual pledge drive
- **A culture of gratitude:** Thank every participant in an appropriate manner

Purpose and Composition of the Committee

The UCE Integrated Stewardship Committee (ISC) was formed by the Board of Trustees (Board) in October 2009 as a means of effectively and efficiently maintaining the financial health of the church. Staff lead of the ISC is the Executive Operations Director. The staff lead shall appoint two members at large, UCE Treasurer, Endowment Chair, Pledge Drive Chair(s), and a Capital Campaign Chair when a Capital Campaign is in planned and in progress. Additionally, the UCE Bookkeeper and one Board of Trustees Liaison will serve. The two called ministers are ex-officio members.

The ISC is tasked with strategic and functional responsibility of eight areas:

1. Overall financial planning for the church
2. Budgeting
3. The Annual Pledge Drive
4. Fundraising
5. Capital Campaigns
6. Coordination with the Endowment Committee
7. Stewardship Education including regular communications with the congregation
8. Financial record keeping.

The ISC has up to 9 voting members, with the ministers serving in an ex-officio capacity, without vote. The voting members include:

1. UCE Staff Lead – Executive Operations Director
2. UCE Treasurer
3. The chair/co-chairs of the Annual Pledge Drive (APD), serving a one-year concurrent term
4. The chair of the Endowment Trustees, serving a one-year concurrent term
5. One voting member of the congregation serving a 2-year term
6. One voting member of the congregation serving a 2-year term,
7. The Church Bookkeeper
8. Board Liaison

There may be other members of the ISC who attend because of reporting/liaison purposes to financially significant church functions, such as fundraisers, social action, or capital campaigns, or because of temporary task forces formed to do specific ISC jobs. These will be important members of the ISC, but they will not have voting privileges. In recent experience, voting has not been an important feature of ISC business, as most times there is consensus agreement on the church budget that the ISC presents to the Board.

The Chair of the Annual Pledge Drive who serves as an ISC member

It is important that the Annual Pledge Drive be represented on the ISC, as this is the main fundraising mechanism for generating the church's income, and it is important that the APD have good support from the ISC. Therefore, the Chair of the APD will be a voting member of the ISC. The Chair of the APD is selected by the ISC.

The Endowment Trustees who also serve as ISC members

The Endowment Trustee who serves on the ISC is the most senior of the church's three Endowment Trustees, since the Endowment Committee is set up so that the chair is passed to the Trustee in his/her third year. An Endowment Trustee is nominated and voted by the congregation to serve a three-year term as a Trustee, with one being elected annually. In their final year as an Endowment Trustee, as is the practice, they serve as Chair of the Endowment Committee. An Endowment Trustee cannot be the Chair of the ISC.

At-Large Members of the ISC

Two positions on the ISC are filled by members of the congregation who are not concurrently serving as Board members or as an Endowment Trustee. These positions are chosen by UCE Staff Lead of ISC and confirmed by members of ISC.

The ISC Approach & Meetings

The ISC is an “umbrella” organization with responsibilities in eight areas as enumerated above. Each of these areas requires the planning, management and execution of several individual tasks. **The ISC works to ensure every task is successful every year.** While the ISC is responsible for the success of each of the eight areas, its involvement with each task varies. During any given year, some tasks may be planned and executed completely by members of the ISC while others will be completely planned and executed with no involvement from a member of the ISC. And there will be those that involve both members and non-members of the ISC. The ISC is both a strategic and coordinating oversight committee as well as a hands-on committee executing critical tasks. Each year will require different levels of support as deemed appropriate by the ISC.

The work of the ISC will be driven by the financial calendar of the church which itself is the responsibility of the ISC; attached is a sample financial calendar. **Principally, the ISC will conduct its strategic and financial planning work as a whole,** but will accomplish tasks using work groups with well-defined objectives and timelines. In situations where a financial task such as a fundraising activity is well staffed and working smoothly, the ISC will have no involvement unless requested.

The ISC will have the following working groups: Budget Working Group, Annual Pledge Drive, Fundraising, Endowment, Information Working Group and when needed, a Capital Campaign Working Group.

The ISC will meet as a whole to plan the financial calendar of the church and discuss strategic priorities and planning. These meetings will primarily occur during the early part of the church year with progress meetings occurring approximately every two months during the remainder of the church year. Working group meetings where specific tasks are planned and executed will occur as needed and will include only those members of the ISC involved with that particular task.

Job Description and Responsibilities

1. Maintain a positive, supportive, and consultative attitude toward the church’s finances and with all those that you will interact with while serving on the ISC.
2. Attend all ISC meetings in addition to one or two initial planning meetings in the July/August timeframe.
3. Serve on one to three working groups with each working group focused on one of the eight areas of responsibility (the capital campaign working group will be staffed when needed).
4. In meetings, and between them, engage in the ongoing visioning, planning and executing of tasks necessary for the sustained financial health of the church.

5. Work, to the best of your ability, to complete the tasks you have agreed to undertake by the planned date, and ask for assistance and guidance of your fellow ISC members when needed.
6. Be a Visiting Steward for no more than four members annually. Not a requirement of UCE Staff Lead and Bookkeeper.

Qualifications

1. Must be a voting member of UCE.
2. Must have a desire to be involved with several areas associated with the financial health of the church.
3. Must exhibit a willingness to take responsibility and be involved, along with the other committee members, in developing and executing UCE's annual financial calendar.
4. Ability to work collaboratively (both in person and electronically) with both the members of the ISC and those other members of the congregation involved with accomplishing ISC tasks.
5. Comfortable working in both a leadership role on some tasks and in a supportive role on others, and with involvement at a variety of levels on multiple tasks simultaneously, as needed.
6. Willingness to ask other members of the congregation to get involved in a particular work group to accomplish a specific, well-defined task over a predetermined length of time.
7. Willingness to be trained as a Visiting Steward for the Annual Pledge Drive and visit members and friends to ask for their pledge and affirm their membership in UCE. (not a requirement of UCE Staff Lead and Bookkeeper.
8. Ability to think and contribute in a creative and strategic manner.

Committee Job Description (revised)

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