

**Report to the Collegium and the UCC Executive Council Development Committee
Best Minds Conversation on Fundraising and Stewardship
October, 2012**

Background

As you are well aware, the philanthropic environment has changed dramatically in the past 25 years. Donor-centered philanthropy, directed giving, and a revolution in technology have impacted financial development programs in all sectors, including the church. While giving programs in the church have also changed in response to these factors, the pace of change has been slowed by a policy base and culture that is regulatory, organizationally focused, and narrow in its theological base and understandings of covenant and philanthropy.

On September 20 – 22, a “Best Minds” conversation was held in Boston as the first step in all-church conversation about giving and the financial health of wider ministries. This all-church conversation will culminate in a reconsideration of the current UCC policy base on giving to the wider church (as codified in the “Patterns of Giving” document from 1986) and a General Synod action in 2015 that will create a new financial covenant . The desired outcome for the Boston meeting was to explore the essential policy directions and philosophical and theological underpinnings for new ways of funding mission and ministry in the future.

While the Boston “Best Minds” group understood the necessity of a two-year conversation, they unanimously and strongly urged immediate action to begin to develop and implement the recommendations that resulted from their deliberations and that will result from the conversation that their findings will spark.

Summary of Findings

The conclusions (principals and recommendations) of the “Best Minds” group are based on the following findings that emerged from the conversation about current practice and culture, and about the nature of fundraising in a faith-based context:

Covenant is an important uniting principle for the various settings of the UCC

The “Pattern of Giving” policy document as adopted and amended does not reflect our contemporary understanding of financial responsibility and relationship.

A new financial covenant between the settings and individuals of the UCC should be a strategic priority

Principles and Recommendations

To build faithful and successful financial development programs for the United Church of Christ we must:

Create and communicate a mission statement and strategic plan that is succinct, bold and widely known and understood

Aggressively engage individual members of the United Church of Christ in supporting ministry beyond their local community

Revitalize congregational support by inviting both unrestricted and directed support

Place engagement through technology at the center of our efforts with donors who are members of UCC faith communities and prospects outside the church

Develop and implement a multifaceted funding strategy that accounts for differences in generation, social location, economic means and theological understandings of stewardship and giving

Make financial development and stewardship a top budgetary and programmatic priority to create a robust fundraising program for congregational and individual support

Create educational and formation programs for clergy and lay leadership that cultivate theological understandings and practical applications related to money in our societal context

Fund and implement a communications strategy that emphasizes impact, covenant, identity and vision

Move our financial development programs from a transactional (institutionally and need focused) posture to relational (responsive and donor centered) one

Develop mutually beneficial partnerships with congregations doing extraordinary philanthropic work

Boston "Best Minds" Participants

The participants in the September conversation on stewardship and financial development were lay and clergy leaders, each of whom brought to the conversation an important perspective on the work.

Sylvia Ferrell-Jones joined YWCA Boston as its President and CEO in late January 2007, after 25 years in the fields of real-estate investment management and non-profit governance and executive leadership. At YWCA Boston, she has shepherded a dramatic shift in the organization's focus, leading towards

greater financial stability and enhanced programmatic outcomes. For twenty years, Ferrell-Jones focused on management of real-estate based assets, serving as a director at AEW Capital Management, headquartered in Boston, and as a principal investment officer with the state of Connecticut Trust Funds, with portfolios ranging up to \$2 billion. Subsequently, Sylvia served as Director of Agency Development for Big Brothers Big Sisters of America, where she provided governance, management and fundraising consultations to a \$26 million not-for-profit affiliate portfolio. A member of Pilgrim UCC, Lexington, MA, Sylvia served as Convener.

Don Clark serves as Nationwide Special Counsel for the United Church of Christ. He is a graduate of Rutgers University School of Law, served as the first General Counsel of Chicago Theological Seminary, and was elected Chair of the Board of Trustees of CTS in 2008. Through The Clark Family Foundation, Don and his wife, Ellen, have been significant charitable investors in a variety of non-profit organizations including the Adler Planetarium, the United Church of Christ, and Chicago Theological Seminary.

Jennifer Kronholm Clark is Registrar for Silver Lake Conference Center in Sharon, CT, the outdoor ministry of the Connecticut Conference, UCC. She has worked as Associate Editor for The Lakeville Journal and as Research Associate in development at The Hotchkiss School. Her B.A. is from Vassar and her M.A. from Trinity College. She is a member of Salisbury Congregational Church in Salisbury, CT, where she has worked as a youth group and confirmation class leader. She lives with her husband, James, and her daughter, Lily, in Lakeville, CT.

Mally Cox-Chapman is the principal of Benefactory, a consulting firm dedicated to increasing the impact and joy of giving for donors and their chosen non-profits. Her degree is in political science from Yale and she is a member of Asylum Hill Congregational Church in Hartford, CT. She is a director of the CT Humanities Council, a lecturer and presenter nationwide in philanthropy.

Rev. Kent French is Lead Pastor of First Congregational Church of Bellingham, WA. A graduate of Northwestern and of Harvard Divinity School, he worked as an actor and singer before entering seminary. During his years at Harvard, he was the undergraduate chaplain at Memorial Church there, and then served at Wellesley Congregational Church in Massachusetts in a Lilly Endowment-sponsored Pastoral Residency program, where he introduced ministries for college students, elders and environmental justice.

Robert Guthrie is the founder and director of Our Spirit, Inc., which uses the broad reach of the internet and the intimacy of film to help youth develop tools for self-acceptance. Previously he served as Communications Director for the Perkins School for the Blind for 14 years. He is a member of FCC, Bellingham, WA.

Rev. Dr. Arthur Keys has over 30 years of experience with domestic and international humanitarian assistance, economic development, and food/agriculture programs. His expertise spans a number of non-governmental organizations as well as private consultancy. Dr. Keys has extensive experience partnering with major U.S. and international development agencies to provide humanitarian relief and assistance to the neediest parts of the world.

Dr. Keys is currently President and CEO of International Research and Development where he has overseen the distribution of more than \$1.75 billion in humanitarian assistance to Asia, Africa, Latin America, Eastern Europe, the Middle East, and the United States Gulf Coast.

Rev. John Lombard has been Senior Minister of Trinitarian Congregational UCC in Concord, MA for 19 years. With degrees from Colby College, University of Wisconsin, Yale Divinity School and Boston University School of Theology, John is deeply committed to parish ministry, development of the life of faith, betterment of local community life and outreach to the larger world including concerns for peace and social justice.

Rev. John Vertigan is the Conference Minister of the Indiana-Kentucky Conference, having begun his ministry there in 2010, after years in parish ministry. He is a graduate of the State University of New York and Bangor Theological Seminary. As Conference Minister he is responsible for the spiritual oversight, executive leadership and missional transformation of UCC churches in Indiana and Kentucky.