



**Wells Stewardship  
Challenge Grant 3.0  
(2023 - 2026)**

**Application  
& Guide**



**WISCONSIN UNITED  
METHODIST FOUNDATION**

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Phone 608-837-9582, FAX 608-837-2492

You can access an online version of this application form  
at <https://www.wumf.org/grants-program/>

# Instructions

**What:** Every United Methodist church in Wisconsin should develop an appropriate, intentional stewardship plan for their congregation. By providing a cash incentive, the Stewardship Challenge Grant is intended as **encouragement** for churches to **develop a comprehensive stewardship program** to help achieve the goals of the congregation in the area of stewardship. Then, after specific goals have been met, congregations may use the money as a **reward** to be used toward the congregation's ministries.

**Why:** The Wisconsin United Methodist Foundation's mission is to assist the ministries of United Methodists in Wisconsin through lifelong financial stewardship. We encourage congregations to ask what God is calling them to do in the area of stewardship. It is our hope that through this Stewardship Challenge Grant, your congregation will make strides in understanding stewardship and the positive impact that giving might have for the people in your congregation and the ministries of the church.

**When:** There is no designated start date to this program. After your initial plan has been submitted and approved, the activities should be completed and the final report submitted all within 12 months. A church may apply once a year in three different years before December 31, 2026, but the limit is 4 grants from 2019-2026. The first grant must be at the Initial or Developing level (see next page).

**How to apply:** There are four different Activity Categories with several options in each category listed on the following pages. Note that **some are Required**. These are designated with the symbol, ®. Decide which tasks you will complete. Indicate them with a check mark on the application form. Keep a copy of the application form and return one to the WUMF for your "encouragement" payout. Call us with any questions.

After completing the activities you have chosen, summarize the experience for your church in 500–2,000 words on a separate sheet. Consider these questions as you reflect on the year's activities.

- What worked?
- What did not work?
- How was this emphasis on stewardship received?
- How were attitudes toward stewardship and church finances changed?
- In what areas did income to the church increase?

Send this summary, along with the documentation of the activities, to be eligible for the remainder of that year's grant funds. **This summary is Required.** You can find a description of what should be included in your final report at: <https://www.wumf.org/assets/UpdatedFinalReport.pdf>

# What's New?

- If a church applies for and completes the Stewardship Challenge Grant for the first time, the church receives an additional \$100 **growth mindset award**.
- If your church has completed the Stewardship Challenge Grant, it is eligible to become a Stewardship Challenge Grant **Ambassador**, which means:
  - Your church will receive \$75 for every church who applies for the Stewardship Challenge Grant because of your church's **recommendation**.
  - Your church will receive \$150 for each church that you **coach/assist** through their first year of the Stewardship Challenge Grant after their final report is turned in and approved.

## Three Levels of Intensity

There are three levels of intensity to encourage progress over the three years. In the first year of funding, you must begin at either the Initial or Developing level. The 2nd, 3rd and 4th year in which you apply, you must maintain or advance to a higher level, demonstrating progress and growth in your plan.

**Initial Level:** Complete 10 or more items on the list (including 8 required and 2 additional activities that must be in different Activity Categories) plus write up = \$500

**Developing:** Complete 14 or more items on the list (including the 8 required and 6 additional activities, one of which must fall in each Activity Category) plus write up = \$600

**Advanced:** Complete 18 or more items on the list (including the 8 required and 10 additional activities, one of which must fall in each Activity Category) plus write up = \$700

## History of the Stewardship Challenge Grant

The Stewardship Challenge Grant (SCG) was created by Jean Nicholas and Lenore Geisthardt to encourage Wisconsin United Methodist churches to undertake best practices of stewardship. The first grants were awarded in 2013. The SCG 2.0 was developed by Jim Wells to encourage churches to move beyond basic best practices and continue their growth and development.

## Funding for the Stewardship Challenge Grant

The funds for the Stewardship Challenge Grant comes from the Foundation's Works Stewardship Fund. The fund was started through the generosity of Ruth Louise Works. Ruth was the granddaughter of a prominent Methodist minister from New York State and she was a member of Kenwood United Methodist Church.

# Leadership for Stewardship

1. ® Have an active **Stewardship Task Force/Team** that is separate from the Finance Committee (although it may be a subcommittee). This Task Force/Team should coordinate the stewardship efforts throughout the year including planning the Annual Financial Campaign and developing the plan for this Stewardship Challenge Grant. Having or establishing this task force is **Required**.
2. ® Develop a plan for **Monthly Stewardship Activities**. Present something stewardship-related each month, in addition to your Annual Financial Campaign. Refer to the Foundation's Ideas for **Year-Round Financial Stewardship** for suggestions. This activity is **Required**.  
<http://www.wumf.org/assets/IdeasForYearRoundFinancialStewardshipBrochure.pdf>
3. ® The pastor or other speaker(s) will deliver several **Stewardship Sermons** throughout the year. At least two should be during an Annual Financial Campaign. At least two other sermons should have a stewardship component in them. Note: it may be helpful to cover financial stewardship topics beyond giving and generosity, like contentment, saving, getting out of debt, etc. This activity is **Required**.
4. Develop a system to **Monitor Giving Patterns** and keep the pastor informed of significant changes in anyone's giving pattern – either up or down. This is usually an indication of a major life change.
5. Church leader(s) will **Attend at Least One Training Event** that has a stewardship component. This may include district leadership training, Annual Conference workshops, Foundation events or other opportunities. The **Stewardship Conference at Pine Lake Camp** held each August is an excellent one.
6. Develop a **3-5 Year Stewardship Plan**. Include an action or activity each quarter relating to stewardship. The **Stewardship Conference at Pine Lake Camp** held each August is an excellent opportunity to begin the process for this and learn how to prepare this plan. Contact the Foundation for samples.
7. **Establish an Endowment Fund**, even if it is unfunded. Develop an endowment policy and an undesignated or planned gift acceptance policy. If you already have these policies in place, review them to make sure they are still current. Develop a plan to regularly advertise this fund. **Samples and consultations** are available from the Foundation at no charge.
8. Provide a **Quarterly Update to the Congregation** of the Year-to-Date giving summary of the congregation and the ministries that are happening because of these gifts. This could be sent with Individual Quarterly Updates (See #11). Report things in a POSITIVE manner. Example: Thank you. Through your generosity we have had 50 students attend our 5 Sunday School classes. In those classes, they have focused on topics like loving your neighbor and forgiveness and how it impacts their everyday lives.

® = Required

# In Praise & Thanksgiving

9. ⑩ Establish and carry out a system to offer **Personal Thanks to Donors** for financial gifts or gifts of time and talent at least twice a year. This is not just standing up on a Sunday morning and saying a general thank you, but rather a personal note, phone call or message from the pastor or someone else. This is **Required**.
10. Have a **Guest Speaker** from a mission, ministry or organization which is financially supported by your church speak at worship or a congregation-wide event such as a special dinner. This should not be an appeal for additional funding, but a thank you and an interpretation of how these gifts change lives.
11. Send out **Individual Quarterly Updates** on giving to all members and other regular worship attendees of their Year-to-Date gifts, including those who have not given to date. Remember to say thank you!
12. Establish and carry out a plan to **Thank New Givers**. A new giver is someone who is not on record as having given before.
13. Develop and carry out a plan to **Celebrate What You Do Have** (and refrain from dwelling on what you DON'T have.)
14. Schedule **Quarterly** (or more frequent) **Testimonies** about giving or volunteering. These could be written, oral or videotaped. Refer to the Foundation's booklet **Ideas for Year-Round Financial Stewardship** for suggestions.  
<http://www.wumf.org/assets/IdeasForYearRoundFinancialStewardshipBrochure.pdf>

⑩ = Required

If you want to learn more about these stewardship best practices, consider:

- Attending the Foundation's Stewardship Conference at Pine Lake (one or two days) - held annually on the second weekend of August.
- Taking part in any of the virtual, in-person, or small-group resourcing events held by the Foundation throughout the year. To find out about what's coming up, visit:  
<https://www.wumf.org/upcoming-events/>
- Subscribing to receive the Foundation's latest virtual workshops for your Stewardship Team.
- Subscribing to receive the Foundation's Stewardship Newsletter, which includes helps for your Stewardship Team. Email [wumf@wumf.org](mailto:wumf@wumf.org) to subscribe.

Visit [www.wumf.org](http://www.wumf.org) or call us at 608-837-9582 for more information.

# Creating a Culture for Giving

15. ® Have a congregation-wide **Annual Financial Campaign**. This must include at least two weeks of stewardship sermons, pledge/commitment/estimate of giving cards distributed to all members and regular attendees, targeted follow-up with those who have not returned cards, and a report to the congregation about the results. This activity is **Required**.

For a summary of annual financial campaigns available for preview in the Foundation's preview library, go to: <http://www.wumf.org/assets/AnnualFinancialCampaignsBrochure.pdf>

16. ® Create a plan to **Challenge** your congregation **to Tithe**. For ideas, see the Foundation's booklet **Ideas for Year-Round Financial Stewardship**. This activity is **Required**.

<http://www.wumf.org/assets/IdeasForYearRoundFinancialStewardshipBrochure.pdf>

17. ® Commit to an **Apportionment Giving Plan** to pay 100% shared ministry (apportionment) funding to the Annual Conference. If you cannot pay 100%, then develop a plan to make a commitment to increase the congregation's giving with an ultimate goal of 100%. Educate the congregation about apportionments. This activity is **Required**.

18. Provide opportunity for **Online and Electronic Giving**. Visit <https://www.umc.org/en/content/have-you-set-up-online-giving-yet-pog> for ideas and assistance.

19. Provide information about and participate in at least four of the six **Special Offering Sundays**: Human Relations Day, UMCOR Sunday, Native American Ministries Sunday, Peace with Justice Sunday, World Communion Sunday, and United Methodist Student Day. **Golden Cross Sunday**, whose offering goes to Health and Welfare ministries in the Wisconsin Conference, is also eligible. Visit <https://www.resourceumc.org/en/churchwide/umcgiving/special-sundays> for more information.

20. Organize an event designed to **Raise Funds for a Mission Project**. This project can be local, in the Annual Conference or around the world. Make sure the emphasis is on how lives will be changed through financial support.

21. Help the **Children and/or Youth** of your church plan a **Stewardship Project**. Invite them to set a goal to help a ministry or mission project and determine an action plan. Celebrate the results with the congregation.

® = Required

# Education on Principles & Concepts

22. ® Develop a **Narrative Budget** to help members understand how their money is used in the church. For instance, the line-item budget will indicate the pastor's salary, but the narrative budget will indicate how the pastor's salary is attributed to pastoral care, worship, education, etc. Samples are available from the Foundation. "How-to" training is available at the Stewardship Conference at Pine Lake Camp, from a Foundation staff person, or online at <https://www.umcdiscipleship.org/articles/creating-a-narrative-budget-the-story-behind-the-numbers>. This is **Required**.
23. Plan a **Congregation-Wide Study** with a stewardship or generosity component. This is not the same as your Annual Financial Campaign but may lead into it or be a part of it. Cokesbury has a number of options available at: <https://www.cokesbury.com/Studies-Stewardship?pagenumber=1>
24. Schedule and conduct a **Planned Giving Seminar** about wills, gifts and memorials. You may have an expert in your congregation or community who may present this. Staff from **the Foundation are available do this free of charge**. There are helpful materials at the Foundation.
25. Offer **Financial Peace University, Freed Up Financial Living, Saving Grace**, or another similar **Personal Financial Education** program to your congregation. Consider taking part in the Foundation's **Saving Grace Grant** to receive seed money and training for class facilitators. Learn more at: <https://www.wumf.org/grants-program/>
26. **Lift up 52 Ministries** of your church through which lives are being changed and share them as a part of worship. Chapter 2 of Donald Smith's book, ***A Better Offering***, has a great description of how to do this well, no matter the size of your church.
27. Regularly use the Foundation's monthly Stewardship Newsletter Article in your church newsletter or as a bulletin insert. See <https://www.wumf.org/newsletter-help-church/> for the current and past newsletter articles.
28. Establish a **Stewardship Resource Library** that is designed to help people Earn, Save, Spend, and Give well. This could be physical resources the church has on hand for people to borrow and/or links on the church's website to **digital resources**, including articles, books, tools, and community resources.
29. **Choose Your Own Idea!**

® = Required

For a fillable pdf version of this application or a template for the Challenge Grant Final Report, visit our website at: <https://www.wumf.org/grants-program/>

If you have questions or need more information, call the Foundation at 608-837-9582.

# THE STEWARDSHIP CHALLENGE GRANT 3.0 APPLICATION AND ASSESSMENT FORM

Church \_\_\_\_\_

Church Address \_\_\_\_\_

Contact Person \_\_\_\_\_

Telephone No \_\_\_\_\_

Email address \_\_\_\_\_

Pastor \_\_\_\_\_

**Grant Level - check one**

Initial Level (8 required + 2)  \$500

Developing Level (8 required + 6)  \$600

Advanced Level (8 required + 10) \*  \$700  
\*limited to Program Year 2, 3 or 4

Year in Grant Program    1    2    3    4  
(since 2019)

**Directions:** Fill out the following table indicating  which activities your church plans to complete to fulfill the requirements of the grant. \$200 will be sent upon completion and approval of this application. To receive the remainder, complete a report as described in the brochure. An description of what to include in your final report can be found at: <https://www.wumf.org/assets/UpdatedFinalReport.pdf>. If your church receives support/coaching with your work on the Stewardship Challenge Grant activities, include the name, address, and a brief description of the assistance provided, and that church will receive \$150.

Activity Category	Activity	✓ Planned Activities	Activity Category	Activity	✓ Planned Activities
<b>Leadership for Stewardship</b>	1. Stewardship Taskforce/Team	<input checked="" type="checkbox"/> Required	<b>Creating a Culture for Giving</b>	15. Annual Financial Campaign	<input checked="" type="checkbox"/> Required
	2. Monthly Stewardship Activities	<input checked="" type="checkbox"/> Required		16. Challenge to Tithe	<input checked="" type="checkbox"/> Required
	3. Stewardship Sermons	<input checked="" type="checkbox"/> Required		17. Apportionment Giving Plan	<input checked="" type="checkbox"/> Required
	4. Monitor Giving Patterns			18. Online & Electronic Giving	
	5. Attend Training Event			19. Special Offering Sundays	
	6. 3-5 Year Stewardship Plan			20. Mission Project Fundraiser	
	7. Endowment Fund			21. Child/Youth Stewards Project	
	8. Quarterly Congregation Updates			<b>Education on Principles And Concepts</b>	22. Narrative budget
9. PERSONAL Thanks to Donors	<input checked="" type="checkbox"/> Required	23. Congregation-wide study			
10. Guest Speaker		24. Planned Giving Presentation			
11. Individual Quarterly updates		25. Personal Finance Education			
12. Thank New Givers		26. Lift up 52 Ministries			
13. Celebrate What you Have		27. Stewardship Newsletter Article			
14. Quarterly Testimonies		28. Stewardship Resource Library			

This is the first time this church is participating in any Stewardship Challenge Grant?     Yes     No

The Stewardship Challenge Grant was referred to us by: \_\_\_\_\_ (Name & city of referring church, if applicable)

Our church was coached/assisted with the Stewardship Challenge Grant by: \_\_\_\_\_ (Name & city of assisting church, if applicable)