



Next Steps Weekend

December 6 to 8, 2019



Stewardship FOR US
Building Cultures of Generosity and Commitment



**Unitarian Universalist
Church of Columbia,
Missouri**

Rachel Maxwell
Stewardship Consultant

My Background

Rachel
Maxwell



- Unitarian Universalist for 25 years
- Member of Edmonds UU Congregation in WA
- MBA, founder of community funding platform
- Leads workshops on Money Value & Meaning
- Experienced UU fundraiser
- Stewardship for Us
 - Five team members
 - UU Congregations only
 - UUA endorsed
- Passionate about building sustainable, generous, UU congregations and making their missions and visions manifest in the world-- A world which could not possibly need it more!

- Gather information about your congregation
 - Received lots of information about your history, finances and structure before the weekend
 - Many meetings and conversations with your minister, lay leaders, and staff over the weekend
 - Questionnaire with your input
- Provide reflections and recommendations to help you meet your goals
 - Presentation after Sunday service
 - Current state and giving now
 - Reflections on readiness
 - Next steps and recommendations
 - Written report within two weeks

What is a Next Steps Weekend?



Review of the Weekend

Friday

- Meetings with Minister and Board

Saturday

- Day: Meetings with Staff and Teams
- Eve: Summarize findings for Sunday

Sunday

- Presentation to congregation after service

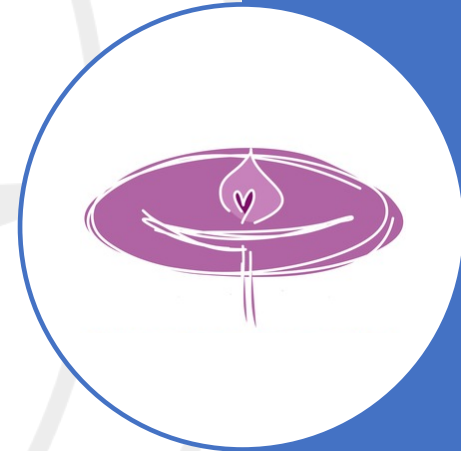
(Written report to follow within two weeks)



Who are you?

Your Mission:

In the spirit of courageous love,
we forge a community of radical
welcome and deep connection
that moves us together to heal
the world.



Who are you?

Your Vision:

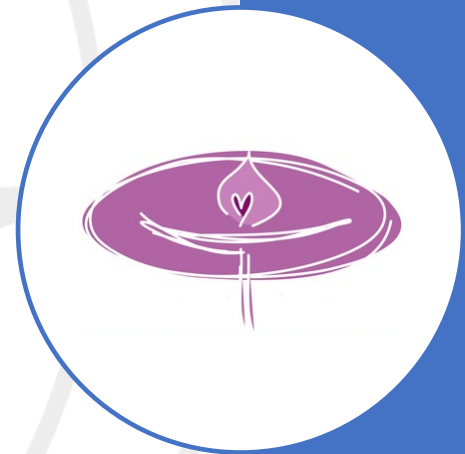
The Unitarian Universalist Church of Columbia:

Transforms lives by calling us to deeper connection, service, and spiritual exploration within an uplifting community of diverse beliefs.

Lights a moral beacon for Columbia and Missouri by creating intentional welcome, relational solidarity, and compassionate action in response to injustices.

Grows in environmental consciousness and advocates for the health of the earth and all living things.

Engages our intergenerational community in faith development and lifelong learning with a spirit of curiosity and openness.



What do you want to do?

- ✓ Be fully accessible to all
- ✓ More program meeting space to fulfill your ministry inside and outside your walls
- ✓ More office and storage space
- ✓ Goal of net zero carbon footprint
- ✓ Room to grow everywhere including the sanctuary
- ✓ Reflect your values in your facilities
 - ✓ Radical welcome for all
 - ✓ Environmentally conscious
 - ✓ Spiritually uplifting



Why do
these
things?

*To "forge a community of
radical welcome and deep
connection that moves us
together to heal the world"*

Happiness is not made by what we own. It is what we share.

- Rabbi Jonathan Sacks





UUCC 2019 as reported to the UUA

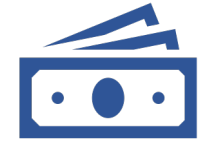
- 280 members
- 151 pledging households
- 160 average Sunday worship attendance
- 93 enrolled in RE
- **\$305,828 pledged for 2018-19**
- Average pledge = \$2,025
- Median pledge = \$1,200
- Annual expenditures = \$289,802



UUCC 2020

- 154 pledging households
- **\$308,129 pledged for 2019-20**
- Average pledge = \$2,000
- Median pledge = \$1,260
- Annual budget = \$340,000

UUCC's Pledge Distribution



Each 25% = ~ \$77,000	# of UUCC Households	Annual Pledge Range	% of Households
First 25%	9	\$6,000 to \$14,400	6%
Second 25%	17	\$3,120 to \$6,000	11%
Third 25%	34	\$1,984 to \$3,100	22%
Fourth 25%	94	\$50 to \$1,800	61%

The Fair Share Giving Guide can help pledgers feel good about their financial commitments



Comparisons

2019 UUA Data

- You are the 19th largest congregation in the MidAmerica region (out of 118 congregations) , you have the 57th largest average pledge, the 14th largest # enrolled in RE, and the 29th largest annual expenditures.
- Of congregations all across the UUA that have a similar number of members where you are the 22nd largest out of 42 congregations, you have the 14th largest average pledge, the 10th largest RE enrollment, and the 39th largest annual expenditures.



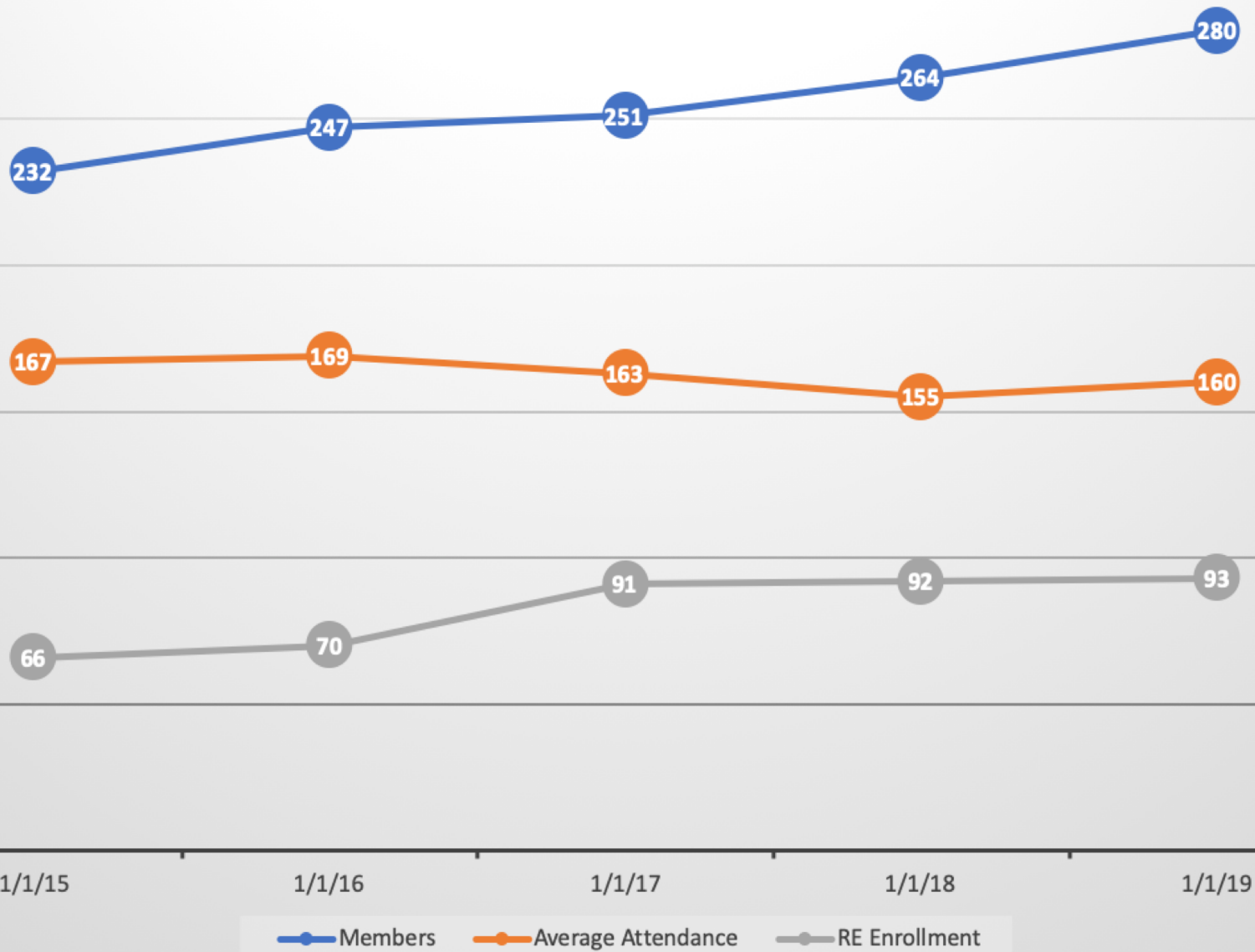
Note: Most congregations have larger annual expenditures than pledge income, you appear to be the opposite!

Your UUA Data spoke to me

I noticed your data showed your membership increased over the course of five years quite steadily while your Sunday service attendance stayed the same.



Five Year Growth as Reported to the UUA



Why is your
membership
growing but
not your
attendance on
Sundays?

My conclusions, that I shared with everyone I met with during the weekend:

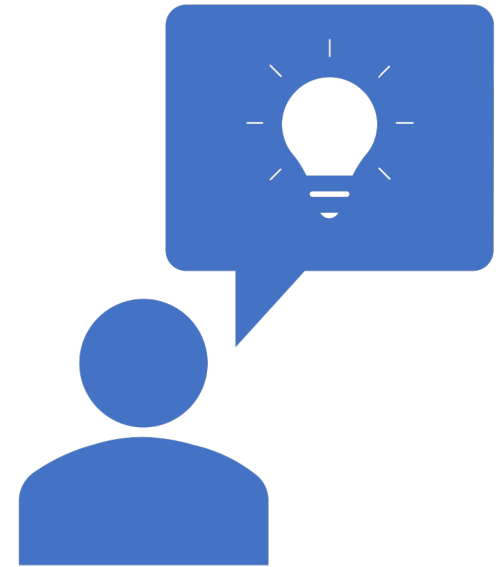
- Your sanctuary may not be big enough to comfortably support your people – let alone growth
- You may not have enough parking for people to comfortably keep showing up

My conclusion: you should reconsider the importance of enlarging your sanctuary.

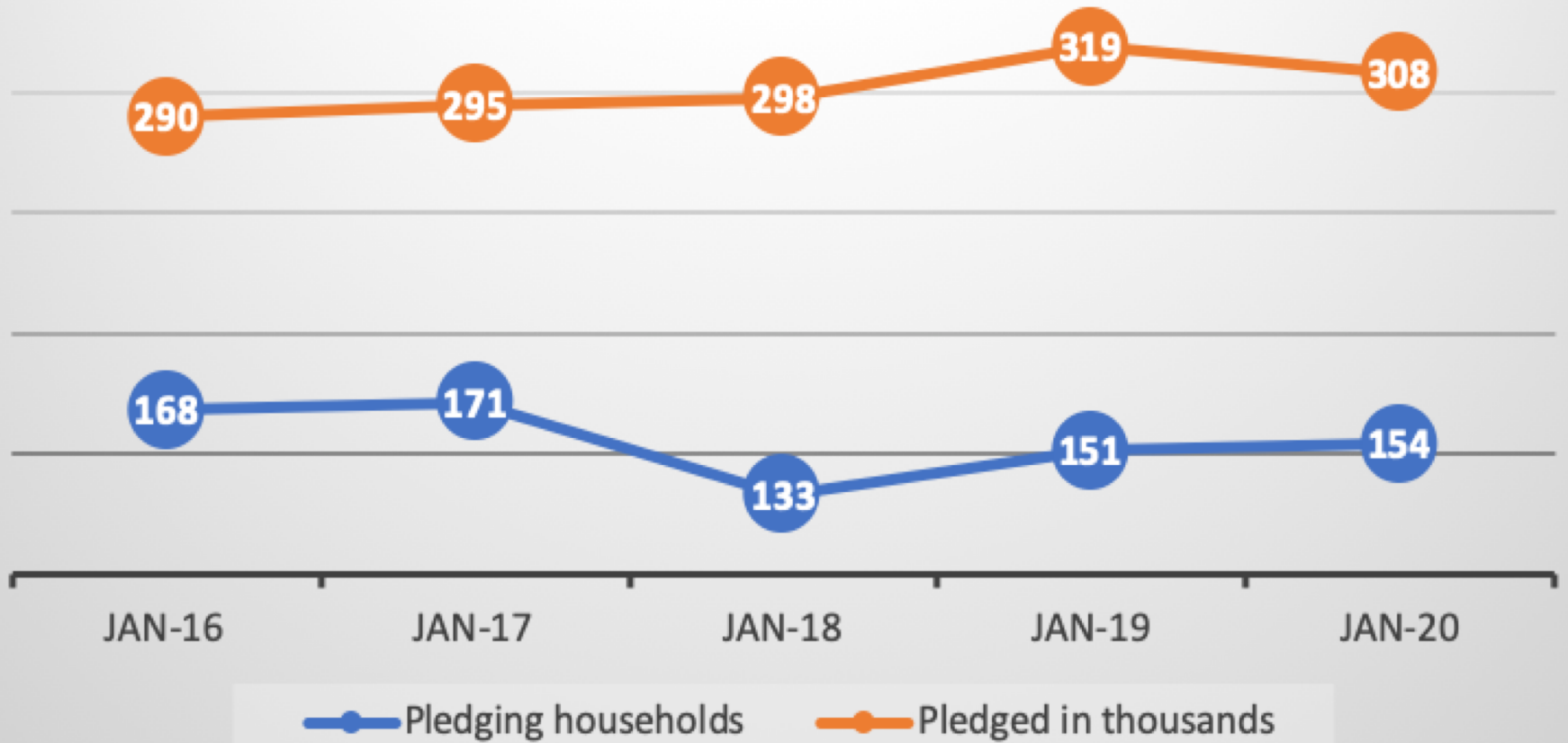
Another possibility

A wise attendee at one of my late afternoon sessions suggested that the data I was using might be incorrect. – Good point!

So I decided to test the data by looking at the info I have on your giving which is from a different source. If I look at the number of pledging households, they should have increased with your membership (just like Sunday morning attendance should have increased with membership growth).



Annual Pledging





Readiness Indicators for Capital Campaigns

1. Healthy finances: annual funding, reserves, processes.
2. Healthy congregation: engaged, covenantal, low anxiety.
3. Compelling shared vision and plan for use of funds.
4. Awareness of need and sense of urgency.

Let's talk about money

There is an ambitious *but realistic* range for a major capital project *if* a congregation has:

- **Reliable annual giving**
- **Shared vision**
- **Sense of urgency**
- **Engaged / low conflict**

And most everyone is excited about the project.

Then the rule of thumb is that you may be able to raise 3-5x your annual giving.

Rule of thumb:

3 to 5x your
annual giving

\$900,000 to
\$1,500,000
for UUCC



Stewardship
FOR US

Guidelines

Raising funds for Capital Campaigns

You may raise three to five times your annual giving if your congregation is healthy and folks are excited to fulfill the needs met by campaign.



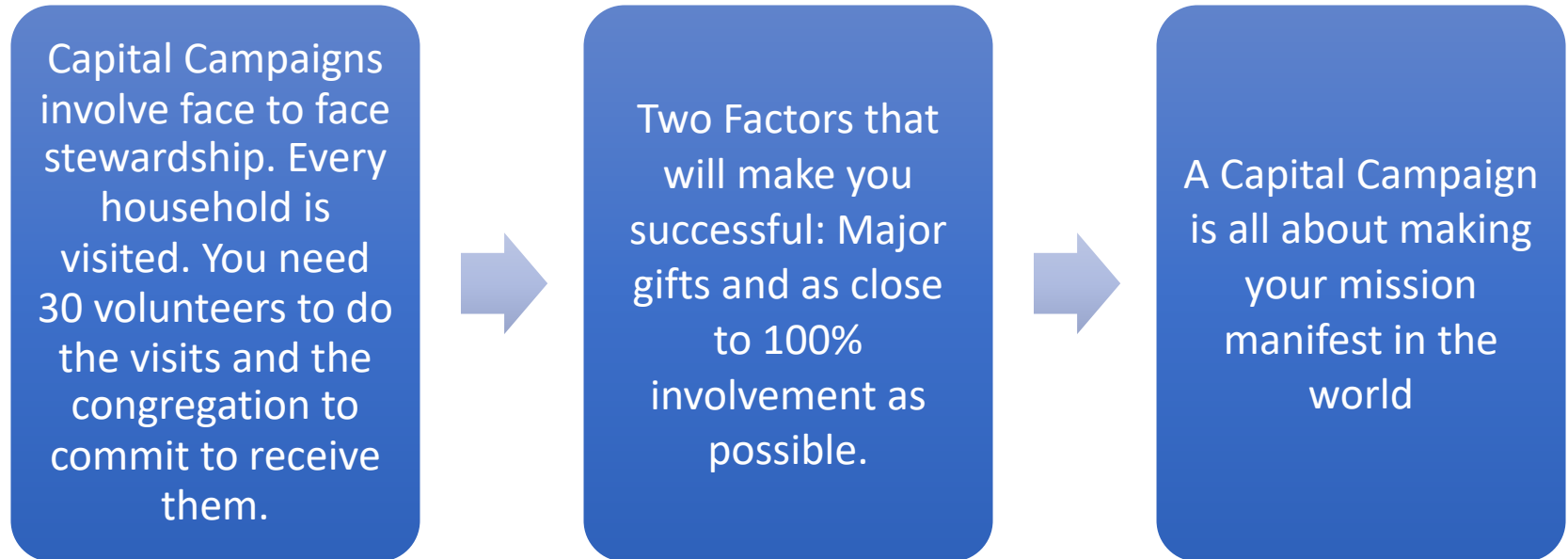
You need anchor gifts including *at least* one which is 15% of total --2 or 3 at this level is best. For a \$1.5M campaign this would be \$150,000 to \$250,000 per gift.



Capital Campaigns do not affect annual giving, gifts often come from assets or savings rather than income used to support your staff and programs through annual giving.

Guidelines

Raising funds for Capital Campaigns



Other sources of funding for Capital Projects

Endowment Funds, Grants and other assets can be used

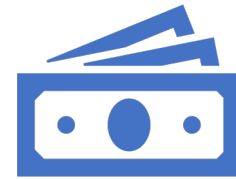
- You have ~\$225k in Endowment
- MidAmerica Region Chalice Lighter Grants – \$10,000 to \$15,000
- Assets owned by the congregation – properties, artwork, other investments.

UUA or other Loans can be useful in moderation

- UUA loan range for buying/renovating is \$50,000-\$900,000
- Municipality and Utility Green Energy Loans
- Maximum loan total can be calculated based on the size of your annual budget
- Debt service should not exceed 15% of annual

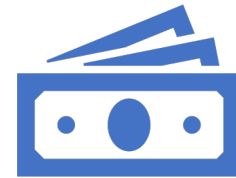
More info on Loans

- Local lender – usually the least expensive option
- UUA has a loan guarantee program to help with local loans
- UUA Building Loan Program – has specific requirements - \$50k to \$900k rate ~6%
- Realistic debt service is 15% or less of annual budget
- \$500,000 loan would be realistic within these limitations (20yr @6%)



Adding it all up

- Capital campaign between \$900,000 and \$1,500,000.
- Loan with debt service at 15% of annual budget ~\$500,000 for 20 year loan at 6%
- Reasonable estimate of total is \$1,000,000 to \$2,000,000 with loan



Financial Forecasting

SUMMARY LEVEL TEMPLATE FOR STRATEGIC FINANCIAL/RESOURCE PLANNING*

Cash Flow: Revenue	YEAR-2	YEAR-1	CURRENT	YEAR+1	YEAR+2	YEAR+3	YEAR+4	YEAR+5
Number of donor households								
Average annual financial commitment (pledge)								
Total annual financial commitments/receipts								
Total capital campaign commitments/receipts if applicable								
Other revenue (itemize major sources and amounts)								
Total Revenue								
Cash Flow: Expenses								
Staffing – number and details								
Payroll expense								
Debt service								
Contribution to reserves								
Generosity (social justice, denominational connection, etc.)								
Capital Expenses if applicable								
Other expenses (itemize facility costs and up to one or two other major cost elements)								
Total Expenses								
NET INCOME/LOSS								
Basic Contextual Data								
Number of members								
Average Sunday attendance (by service if multiple)								
Re enrollment								
Average RE attendance (by meeting time if multiple)								
# Classrooms needed								
Long-term fund balances (e.g., endowments, trusts)								
Debt Service as a percentage of operating budget								
Other key parameters (e.g., parking spaces)								

* Note: rows may be tailored to your needs, and plans may extend beyond 5 years. Details may be itemized on subsidiary sheets/schedules.

The Campaign Team

Campaign co-chairs

Leadership Gifts co-chairs

Events co-chairs

General Gifts co-chairs

Publications co-chairs

Publicity/Communications
co-chairs

Campaign Treasurer

Follow-up co-chairs

Visiting Stewards

Team Leaders

Administrative support



You Chose 3 Top Strengths

<https://www.surveymonkey.com/r/UUCC>

83 Respondents

YOUR TOP SIX CHOICES:

51 – Community / People

51 – Minister / Staff

31 – Welcoming / Inclusive

30 – Children & Youth RE

29 – Social Justice

24 – Sunday Services



Top Challenges to Address in Next 5 Years

<https://www.surveymonkey.com/r/UUCC>

YOUR TOP THREE CHALLENGES:

62 – Facilities

38 – Volunteer growth

36 – Growth of membership



Top Priorities to Further Your Mission

<https://www.surveymonkey.com/r/UUCC>

YOUR TOP FIVE PRIORITIES:

51 – Facilities Improvement / Expansion

38 – Social Justice

31 – Increase Volunteer Base

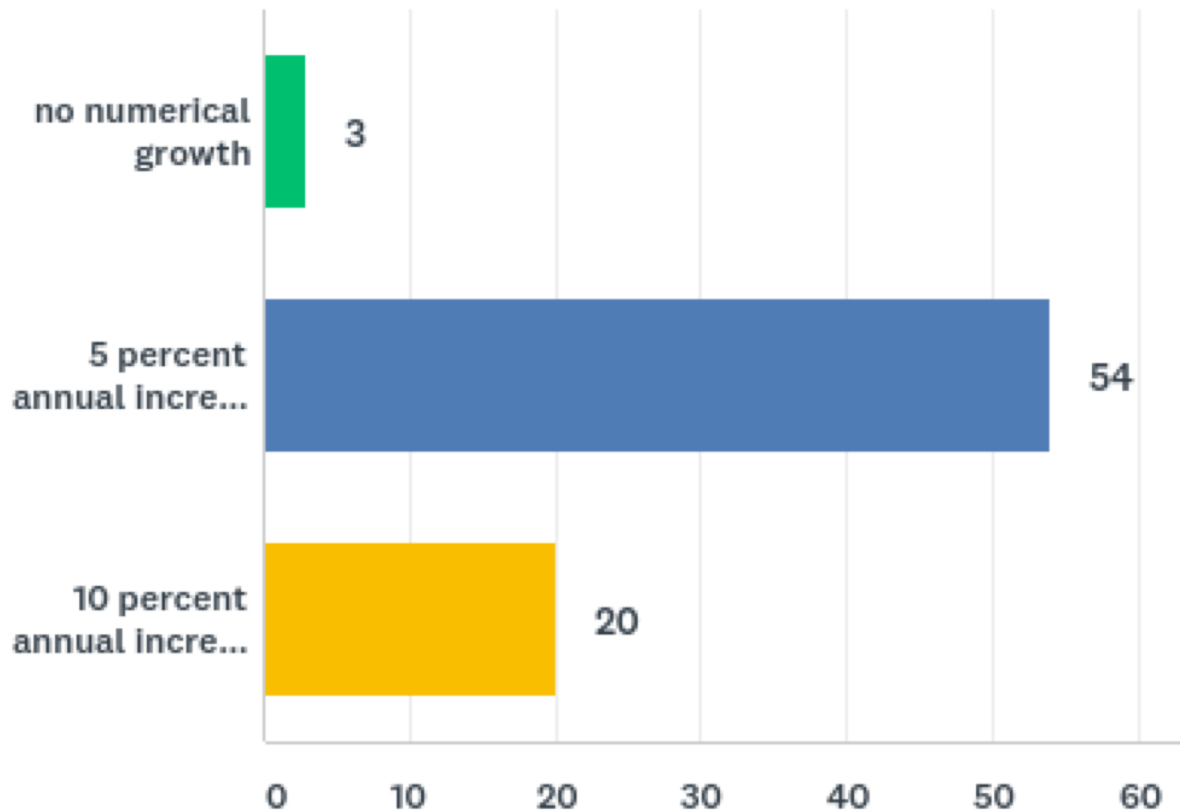
29 – Children and Families

27 – Membership Growth



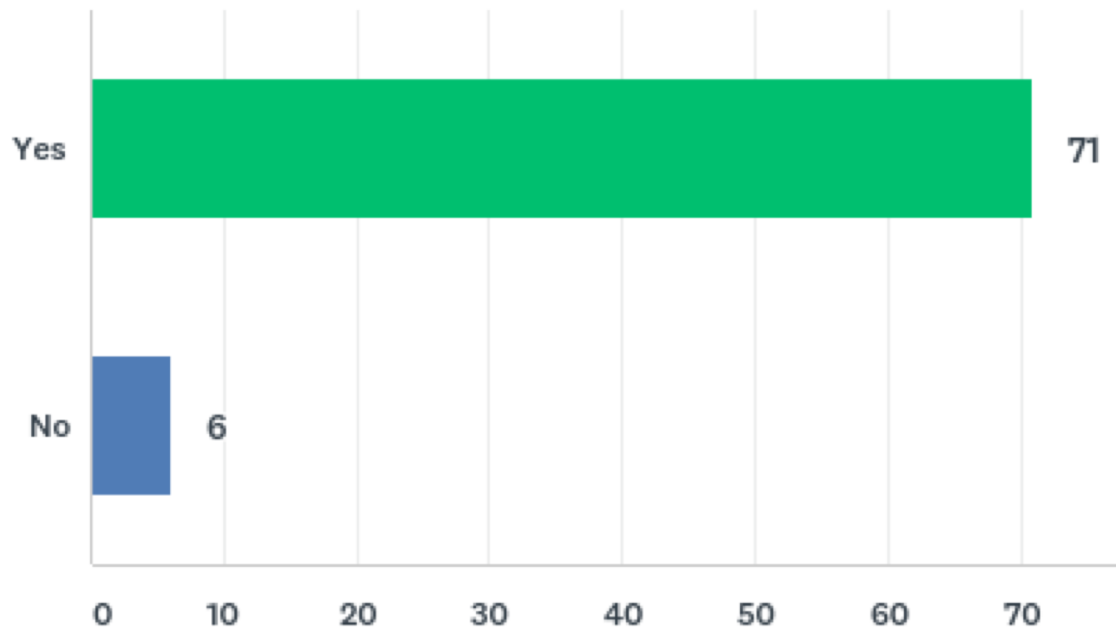
Hoped for Growth Rate

<https://www.surveymonkey.com/r/UUCC>



Will Support Capital Campaign

<https://www.surveymonkey.com/r/UUCC>



In comments:

8 said they support the campaign but were worried about their own financial capacity

3 said maybe

2 said no simply due to income limitations



Can you
do this?

Do you have:

- ✓ **Reliable annual giving**
- ✓ **Engaged / low conflict**
- ~ **Shared vision and plan**
- ~ **Sense of urgency**

And most everyone is excited
about the project?

You're getting there...

Blessings



**Unitarian Universalist
Church of Columbia,
Missouri**

- Wonderful Inspiring minister
- Deep connection to your mission and vision
- Strong and varied programming
- Growth in numbers and impact
- Creative committed leadership
- Nurturing of diverse spiritual needs
- Beautiful large campus and woods
- You love and accept each other

Challenges

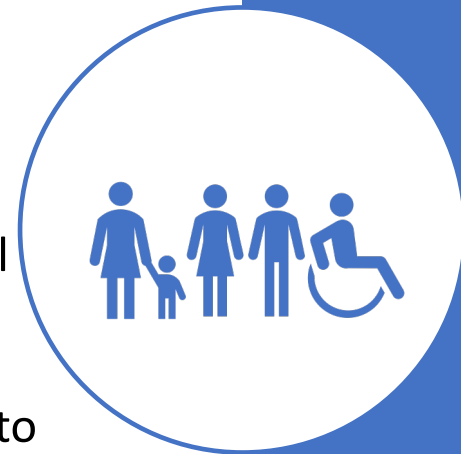


**Unitarian Universalist
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- Lack accessibility
- Small parking lot
- Crowding in and outside of sanctuary
- Need to reduce your fossil fuel dependence
- Inadequate meeting rooms in size, ventilation, and number
- Noisy – limited calm sacred space

Work to Do / Next Steps

- Data checks for past 5 to 7 years
 - Are you growing in total membership?
 - Check actuals on Sunday Service attendance, membership and # of pledging households
- Revisit what you need and want
 - Parking spaces – Develop use of shared school lot when needed
 - Can you make it more accessible?
 - Provide more structured opportunities for all to weigh in on what they'd like to see
- Reduce anxiety about talking about money
 - Share your money stories
- Create a Financial Forecast
- Recruit a Capital Campaign Team



Possible Timeline

- Winter/Spring 2020
 - Data check about growth and numbers
 - Work with architects on needed revisions in possibilities and costs
 - Annual Budget Drive
 - Develop Financial Forecast
 - Host more ways for people to give input on what they'd like to see happen
- Summer 2020
 - Rev. Molly sabbatical
 - Work on Campaign/Building plans



Possible Timeline

- Fall 2020
 - Rev. Molly returns
 - Building plans gelled
 - Educate the congregation about the building plans and campaign process
 - Feasibility Study invitation list
- November 2020
 - Presidential election VOTE!!!!
 - Invite people to Feasibility Study
- December 2020
 - Feasibility Study and results



Possible Timeline

Winter/Spring 2021

- January
 - Hone campaign goal
 - Campaign strategy finalized
 - Congregational vote on campaign
- February
 - Visiting Steward training
 - Quiet/leadership phase of campaign
- March/April
 - Launch dual campaign – Capital and Annual and conduct stewardship visits



Can you do
this?

YES you
can!

"To be hopeful in bad times is not just foolishly romantic. It is based on the fact that human history is a history not only of cruelty, but also of compassion, sacrifice, courage, kindness. What we choose to emphasize in this complex history will determine our lives. If we see only the worst, it destroys our capacity to do something, If we remember those times and places -- and there are so many -- where people have behaved magnificently, this gives us the energy to act, and at least the possibility of sending this spinning top of a world in a different direction. And if we do act, in however a small way, we don't have to wait for some grand utopian future. The future is an infinite succession of presents, and to live now as we think human beings should live, in defiance of all that is bad around us, is itself a marvelous victory."

-- Howard Zinn

In the spirit of
courageous love, we
forge a community
of radical welcome
and deep
connection that
moves us together
to heal the world.

Thank
you for
all you
are and
do!



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Rachel Maxwell
Rachel@StewardshipForUs.com
425.231.8313



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**Unitarian
Universalist
Church**