



Conejo Valley Unitarian Universalist Fellowship



Next Steps Weekend Summary

November 5, 2017

Kay Crider, Stewardship for Us

My Background

- Unitarian Universalist for 25 years
- 17 years of professional fundraising experience
- Stewardship for Us
 - Five team members
 - UU Congregations
 - UUA endorsed
- Passion for helping you successfully fund your mission, vision and church home projects



What is a Next Steps Weekend?

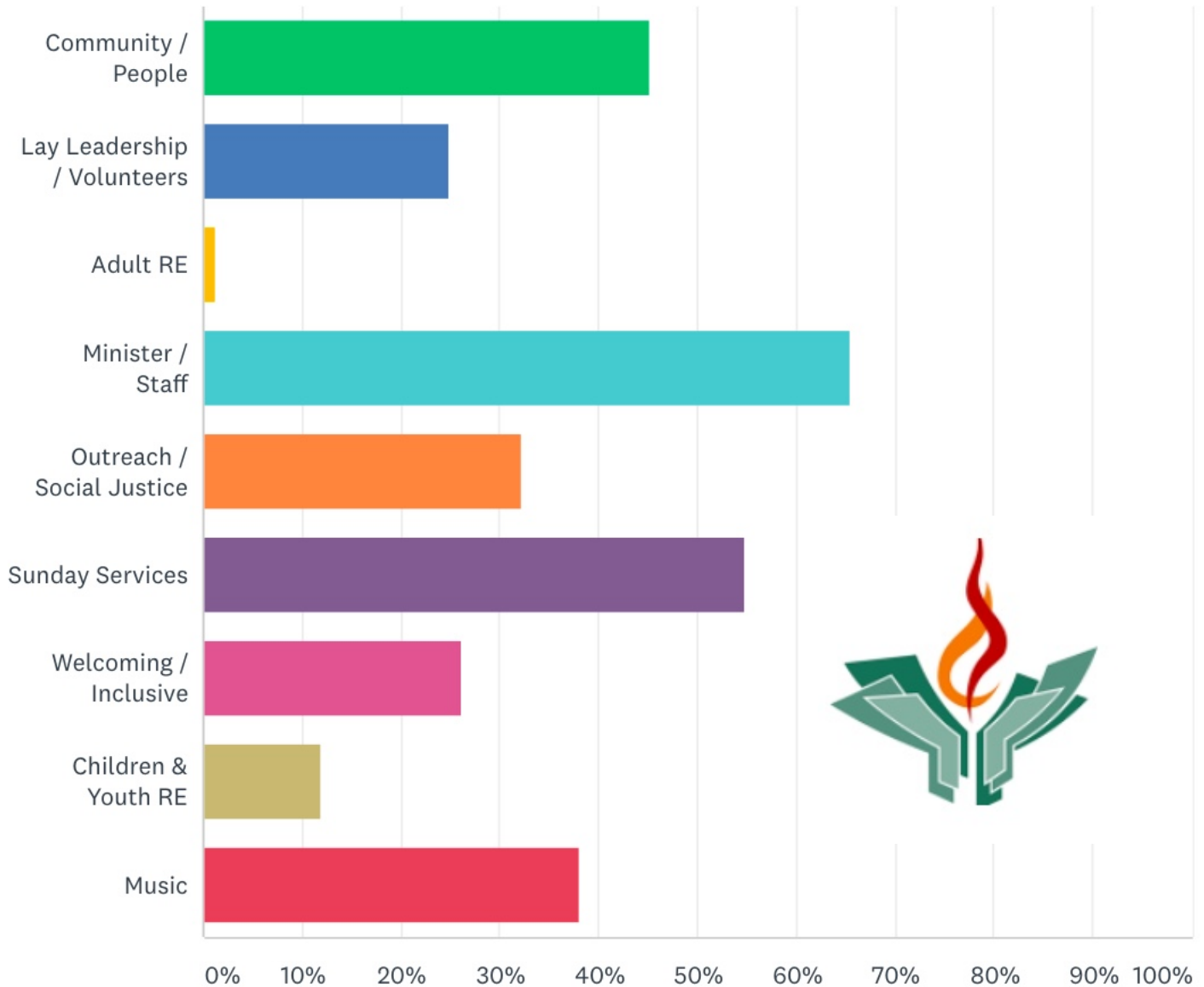
- Gather information about your fellowship
 - Received lots of information prior to my visit
 - Lots of meetings and conversations this weekend
 - Online questionnaire for your additional input
- Provide recommendations to meet your stated goals
 - List of steps and best practices
 - Summary Presentation after Sunday Service
 - Written report



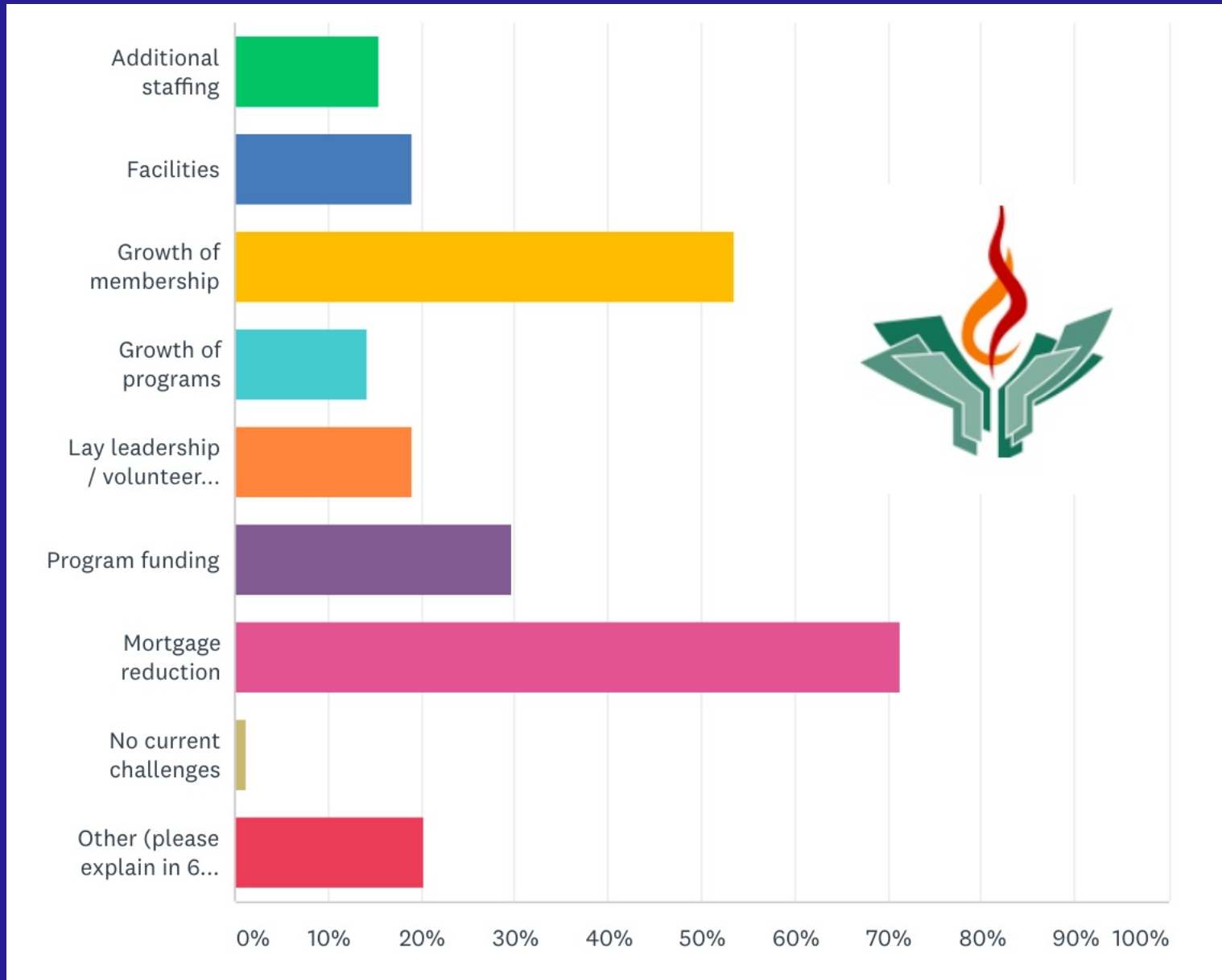


The Mission of the Conejo Valley
Unitarian Universalist Fellowship is
to nurture spiritually courageous people
who transform the world
through justice and compassion.

Greatest Strengths



Challenges Identified



Survey
says ...



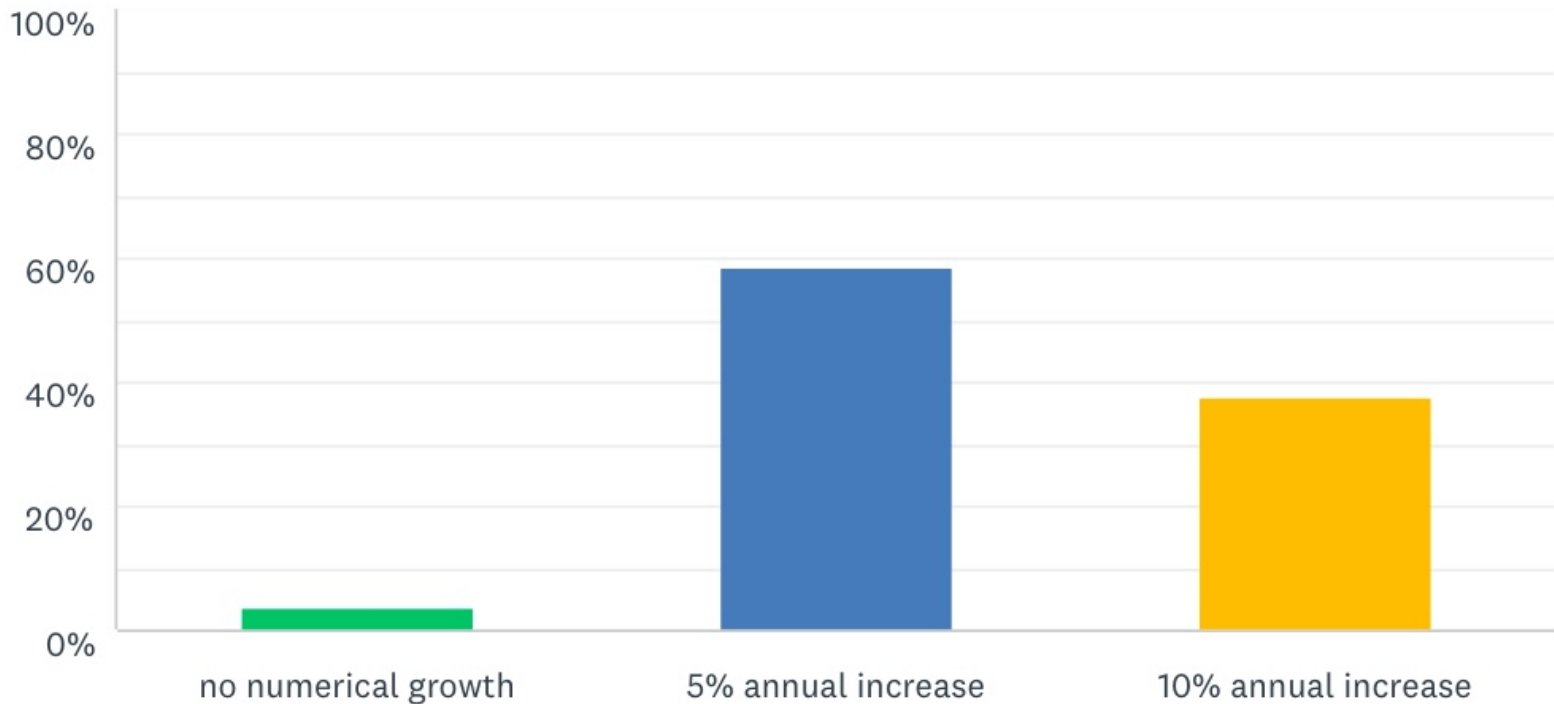
TOP 3 **Priorities**

- Membership Growth – 65%
- Mortgage Reduction – 57%
- Outreach /Social Justice 41%

Survey
says ...



Hoped for Growth Rate



Support for 3-year Capital Campaign



- 40 of 80 people = Yes
- 14 of 80 people = No
- 37 people commented

2017-18 Pledge Totals

- Pledge totals for 2017 = \$337,765
 - Average pledge = \$2,321
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- Your median pledge is \$1,200
- UU recent median pledge is ~\$1,000



Your 2017-18 PLEDGE Distribution

	# of CVUUF Households	% of Households	GOAL # of Households	GOAL % of Households
First 25%	5 ↑	3%	15	10%
Second 25%	13 ↑	9%	22	15%
Third 25%	27 ↑	19%	37	25%
Fourth 25%	101	69%	73	50%

Some movement from each quartile upward into the next higher quartile will give you a healthier distribution and more funds for your mission. You can use the Fair Share Giving Guide or the modern tithe or Don's chart to get there!



Your 2017-18 PLEDGE Distribution



General Guidelines on Amounts Raised in UU Capital Campaigns

From a successful Capital Campaign you may raise 3-5x your annual giving = \$1,013,295 To \$1,688,825

- For this type of campaign, usually 3x is common
- Need *at least* one gift = 15% of total to reach 3x your annual giving (2 or 3 s even better!)
 - If your goal is \$1,000,000, at least one \$150,000 gift
- Gifts for buildings often come from assets or savings rather than income for programs

These guidelines apply when you have a shared vision, minimal conflict, consensus on your project, you plan your campaign well and use visiting stewards.



Existing Mortgage & Past Rent

- \$869,000 owed on mortgage
- \$154,000 due in past rent
- UUA recommends debt service stay below MAX 25% of annual budget
- Realistic debt service 15% or less of budget
- Current debt + rent is 35% of annual budget

Total: $\$869,000 + \$154,000 = \$1,023,000$

Do you want to round up a bit to enhance programs?



Readiness Indicators for a Capital Campaign

- A compelling Vision and Plan for your Programs and Building
- Awareness of need(s) by the members; sense of urgency
- Engaged fellowship & low conflict
- Healthy stewardship
 - Congregants have good giving habits
 - Able to talk about financial commitments



What does a personal stewardship conversation look like today?

- Meet for coffee, lunch, or at home (~1 hour total)
 - Get to know each other better (30 min.)
 - You share what you love about your church (10 min.)
 - They share what they love about the church (10 min.)
 - The Ask: Financial commitment form (10 min.)
 - It's fun and you get to better live out your mission!
- ~ Be kind & gracious when you get a call! ☺



A few stories I heard this weekend

- My visiting grandson asked me if we could go to church this weekend
- I am filled to the brim with everyone singing
- I have so many meaningful connections with people here
- Chalice Circles have deeply impacted my life and allowed me to get to know people on a different level
- I received so much support in my time of need
- My Neighborhood Network is like a family within CVUUF
- People sharing their personal stories moves me



A few more stories ...

- It's wonderful to have 4 generations of my family here
- The success of our social justice group last Sunday
- The deep sharing that happens in my covenant group
- The Women's Retreat is profound for me every year and sustains me
- My participation in the choir is fun!
- O.W.L. teaching and interacting with the kids is great
- Sharing of Joys, Concerns & Community



What could you do if mortgage and past rent paid?

- ❖ Membership / volunteer coordinator?
- ❖ Fund a large social justice project?
- ❖ Increase music ministry?
- ❖ Grow YRUU – part-time youth advisor?
- ❖ More time & resources for Adult RE &/or community forums?
- ❖ Breathe a sigh of relief!



Commendations for CVUUF

- Great average pledge!
- Settled minister that you love and trust
- RE attendance & membership growing
- Beautiful AND functional spaces!!
- Concise, memorable, inspiring mission stmt.
- Great leadership and volunteer participation
- Robust number of activities and engagement
- You know how to get along



Observations about CVUUF

- Debt is too big a portion of your budget – not sustainable
- Pledge distribution can be improved
- Need a shared vision of what you will accomplish with freed up funds
- Pledge drive cycle is unusual – switch?
- Not a lot of photos reader boards in Fellowship Hall & could use more photos on website subpages 😊



Recommendations for CVUUF

- Articulate your shared vision & goals for program, staff & membership going forward
- Map out your 5-year financial plan for church
 - ❑ Building AND Programs with debt paid down
- Think deeply about the legacy of this building and how that differs from your annual giving
- Add photos on website and reader boards



Ambitious Timetable

November/December 2017

- Create a list of things you could do w/o large debt
- Prepare five-year ambitious but realistic financial plan
- Plan for upcoming Financial Feasibility Study
- Recruit capital campaign leadership & begin core planning (timeline & tasks)

January 2018

- Prioritize your list of things you could do w/o large debt
- Financial Feasibility Study
- Assemble entire Capital Campaign Team & continue planning



Ambitious Timetable (cont'd)

February 2018

- Set campaign goal based on Financial Feasibility info.
- Congregation votes on capital campaign; if supermajority votes YES, then ...
- Recruit remaining visiting stewards (some ID's in FFS)
- Continue campaign planning

March 2018

- Train visiting stewards
- Proceed with Quiet/Leadership phase of campaign
- Continue main launch campaign planning

April 2018

- Launch Capital Campaign



Moving Forward

- ✓ Shared Vision, Shared Values & Deeper Connections
 - All lead to fulfilling and funding your hopes and dreams for your congregation
- ✓ Hold each others hearts in your hands
 - Listen attentively
 - Express appreciation often

YOU CAN DO IT!



Make no little plans.

They have no magic to stir the blood and
probably will not be realized.

Make big plans.

Aim high in hope and work, remembering that
long after we are gone our work will
continue to be a living thing.

Remember that our children and grandchildren
are going to do things that would stagger us.

So, make no little plans.

– Daniel Burnham



I hope our time together was
valuable to you



Do you have any
questions?



Thank you!



Kay Crider
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