

**Next Steps Weekend Report
for the Conejo Valley Unitarian Universalist Fellowship**

I. Summary

The Conejo Valley Unitarian Universalist Fellowship in Newbury Park, CA (CVUUF) engaged Kay Crider, a Stewardship Consultant, to conduct an on-site visit. The scope of work was to provide an independent, professional opinion on recommended next steps with the goal toward an eventual capital campaign. CVUUF wants to reduce the amount of the annual funding spent on the mortgage and interest for the fellowship's home in order to have a greater percentage of the budget spent on programs. The findings are summarized in the following outline and detailed further in the remainder of the report.

A. Commendations

- Great average pledge
- Settled minister that you love and trust
- Membership is growing
- Beautiful & functional spaces
- Concise, memorable, inspiring mission statement
- Great leadership & volunteer participation
- Robust number of activities & engagement
- You know how to get along

B. Observations

- 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 redirected funds
- Pledge drive cycle is unusual
- Not a lot of photos on reader boards in Fellowship Hall & you could use more photos on website subpages

C. Recommendations

- Articulate your shared vision & goals for program, staff & membership
- Map out your 5-year financial plan for building AND programs with debt pay down
- Think deeply about the legacy of this building and how that differs from your annual giving
- Add photos on website and reader boards
- Consider a Financial Feasibility Study

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II. Basic Data on the Congregation

Name and Mailing Address of Congregation	Conejo Valley Unitarian Universalist Fellowship, 3327 Old Conejo Rd, Newbury Park, CA 91320
Website Address	www.cvuuf.org
Minister	Rev. Nica Eaton-Guinn
Lay Leader Point of Contact	Tom Wolf, Board President
Number of Members	206
Annual Financial Commitments for 2017-18	\$337,765
Average Household Financial Commitment	\$2,329
Median Household Financial Commitment	\$1,200
Current Operating Budget	\$406,086
Endowment	none
Most Recent Approaches to Annual Budget Drive	4 receptions in fall 2017; face-to-face campaigns in fall 2015 & 2016; year-round pledging prior to fall of 2015
Recent Capital Campaign	10 years ago to buy one of two buildings after years of rental; sanctuary currently owned by OCR investors

III. Objectives and Scope of the Next Steps Weekend

The purpose of the Next Steps Weekend is to provide your congregation with an objective eye to identify strengths, opportunities, and any areas needing improvement in light of the congregation's stated goal of a capital campaign to reduce debt load and direct more resources toward your mission, vision and programs.

Prior to the on-site visit, Kay received and reviewed substantial material, including information on finances, programs, staffing, congregation history, by-laws, and annual reports.

Kay also had email exchanges and/or telephone conversations in advance of the visit with:

- Tom Wolf, President of the Board
- Don Cooper, Stewardship
- Rev. Nica Eaton-Guinn, Minister

While on site, Kay met with the minister, board and church committees to gather information in person about programs and stewardship and to provide information about next steps for moving forward. See Appendix A for the Next Steps Weekend Agenda.

IV. Commendations, Observations and Recommendations

A. Commendations

1) You have a great average pledge and good median pledge.

For the 2017-18 current church year, your average pledge is \$2,329 and your median pledge is \$1,200. The current average pledge is \$1,744 for the 58 UU congregations in California who reported data in January 2017. Median pledge information is not available for those California congregations, however, for congregations who provided data to Stewardship for Us consultants, the median pledge is approximately \$1,100.

2) You have a settled minister that you love and trust.

Rev. Nica is in her second year of settled ministry. Congratulations on that successful search! She has a lot of energy, enthusiasm and talent that she is sharing with your congregation which is reflected in the growth of members, giving and volunteer support.

3) Your membership is growing.

Starting with six couples in 1961, you have grown to approximately 200 members! Like every congregation, you have had various periods of membership growth and attrition, however, membership is growing again now under your new ministry.

4) You have beautiful AND functional spaces.

Your spaces for Sunday services and fellowship and your kitchen, offices, and other rooms for RE of all ages and meetings is wonderful. I know that you would prefer a bit more sanctuary space, but for now the space is beautiful and welcoming. Many congregations do not have the amount of space you enjoy and it is not near as aesthetically pleasing – you have a somewhat unusual combination compared to many UU congregations. Your building is a great asset for your fellowship.

5) You have a concise, memorable, inspiring mission statement.

Your mission statement is excellent: “to nurture spiritually courageous people who transform the world through justice and compassion.” It is inspiring and reflects our 7 principles but is brief and easy to remember.

6) You have great leadership and volunteer participation.

Throughout the weekend meetings, you had superb participation. Many dedicated and talented lay leaders described their programs and ministries and provided input on what they would like to see happen moving forward.

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7) You have a robust number of activities and engagement.

For your size congregation, you have a wide array of activities and service in which your members and friends can participate. It is at a level that exceeds what I often see at congregations who are even larger than CVUUF. Superb job on your high level of function and engagement.

8) You know how to get along.

Also evident during the weekend is the care you have for each other as you give of your time and talent and interact with each other at a variety of levels. Your board leadership also has a healthy dynamic and the meeting I had with the board was one of the most friendly and relaxed that I have ever attended. Congratulations on the healthy dynamic of that group of leaders.

B. Observations

1) Debt is too big a portion of your budget – it is not sustainable

Currently, your mortgage payments for the building that houses your Fellowship Hall, kitchen, offices, RE rooms and other meeting space, combined with your rent payments for the sanctuary building equals about 35% of your total annual budget. This large debt load has resulted in some deficit spending in the last several years. This past year the increased amount of pledge income has reduced the amount of deficit spending in the current program year, however, the ~\$130,000 in reserve funds will be used up in a few years if you do not reduce the size of your mortgage. You are wisely looking at the possibility of capital campaign after a special task force looked at a variety of options.

2) Your pledge distribution can be improved.

A quartile analysis of annual financial commitments (pledges) is one of several tools to help determine the fiscal health of your congregation. For a quartile analysis, all of the financial commitments are arranged in descending order, from largest to smallest. The total commitments are then divided into four equal parts or quartiles. For your congregation, your annual pledges for the current 2017-18 program year are \$337,765. Dividing that number into four equal parts means that each quartile is approximately \$84,444.

A realistic healthy distribution of financial commitments can be defined as having 10% of the congregation in the top quartile, 15% in the second quartile, 25% in the third quartile and 50% in the fourth quartile. Looking at the following table, CVUUF's distribution of financial commitments shows 3% in the top quartile, 9% in the second quartile, 19% in the third quartile and 69% in the fourth quartile. The weight of financial support falls disproportionately on the largest donors—your congregation is dependent upon 5 of 146 households for 25% of its annual pledge income and 18 of 146 households for 50% of all annual financial commitments. The church is vulnerable to financial instability if just one or

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two of the first or second quartile donors moves, passes away or decides to donate elsewhere. Increased contributions from the lower two quartiles will result in better distribution and stability as well as increased funding overall.

2017-18 DISTRIBUTION OF FINANCIAL COMMITMENTS

	# 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%

3) You need a shared vision of what you can accomplish with less debt

You have done some visioning and planning for the current year. In order for everyone to participate to the best of their ability in a debt reduction campaign, they will need to participate in the planning about what is possible with more money directed to programs (and less to debt).

4) Your annual giving drive cycle is unusual.

Your church fiscal and program year are similar to most other UU congregations that follow a July to June cycle. Currently you do a pledge drive in the fall for the program year that has already started. Most often a congregations with the July to June fiscal year do a spring annual giving drive so that they can plan their budget around the total pledged amount. Shifting your cycle may make it easier for the budget team and the congregation to know the scope of what can be funded in advance of the vote.

5) There's not a lot of photos on reader boards in the Fellowship Hall & your website subpages could use more photos

Your lovely Fellowship Hall has some great space to advertise church programs and a variety of events and miscellaneous items. Many of the postings are word dense without graphics or photos, which can seem daunting to someone trying to decide what to read. A recent study showed that your website is the place where potential visitors go first to learn about your church. You have several subpages on your website that have a reasonable amount of words, but no photos to help visitors visualize that activity or program. You have beautiful space and many engaging programs, so show it off on the web!

C. Recommendations

1) Articulate your shared vision and goals for program, staff and membership

Build upon the visioning work you have already started and extend that out 5 years into the future. Take the next step to articulate specific programmatic goals, along with the related staffing and volunteer needs over the next 5 years. Plan what you want to accomplish together when you have reduced or even eliminated your mortgage. That planning will help your members and friends envision the path you will take and how that can be achieved when a significant amount of your pledge income is redirected from debt to programs.

The electronic survey filled out by 89 congregants in the days prior to, during and immediately following the Next Steps Weekend indicated that the top 3 priorities for CVUUF to further its mission going forward were:

- ❖ Membership growth - 65% of respondents listed this priority
- ❖ Mortgage reduction – 57% of respondents listed this priority
- ❖ Outreach/social justice – 41% of respondents listed this priority

Committees, teams and staff were asked “What could you do if the mortgage was reduced and past due rent was paid off?” Following were some of the ideas that were surfaced:

- ❖ Membership / volunteer coordinator
- ❖ Fund a large social justice project
- ❖ Increase music ministry
- ❖ Grow YRUU with a part-time youth advisor
- ❖ Grow Adult RE & community forums

Be ambitious but realistic in mapping out your plan with the number and scope of items; add only one or two new or enhanced goals per year, depending on the size of the task. You don’t need a 50-page, dust-gathering document that is difficult to use, but rather a short, living, breathing document – 5 to 10 pages – to articulate your goals and the teams responsible for shepherding that goal. Make sure that each goal relates back to your mission and vision.

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2) Map out your 5-year financial plan.

A five-year financial plan is an essential tool to help you see the effect of a mortgage reduction or elimination. Prepare a couple of versions that show the difference if you pay down a portion or all of your mortgage. See Appendix B for a sample spreadsheet for strategic/financial forecasting.

To help in your planning, the general guidelines on how much you may be able to raise for a capital campaign, if other aspects of a congregation are healthy, is 3-5x your annual giving for a building project. Currently, your annual pledges are \$337,765 that generates a range of \$1,013,295 to \$1,688,825. Debt reduction campaigns typically tend toward the lower end of this range, with some debt campaigns topping out at two times annual giving, which would be \$675,530.

Your current mortgage has \$869,000 outstanding and CVUUF also owes approximately \$154,000 in past rent to the OCR group of investors that owns the sanctuary. Those two items together total \$1,023,000. A financial feasibility study can help you define a realistic campaign goal, help gauge interest and enthusiasm for the campaign, and identify a significant amount of gift intentions. See <http://stewardshipforus.com/financial-feasibility-study/> for a detailed explanation of the scope of a study.

Typically, you will need at least one gift that equals 15% of the campaign total to reach the bottom end of a campaign range and two or three of that size can help you reach a higher end in the range. For a million dollar campaign, for example, you would need at least one gift of \$150,000 or higher.

Gifts usually come from assets or savings rather than the income you use to support your programs on an annual basis, however, some people will be giving their capital gifts out of income. Many people will pay their capital pledges over a three-year period although around half of the pledge total often comes in the first year of the campaign. These general guidelines apply when you obtain congregational consensus, your congregation is financially healthy, has minimal conflict and you plan your campaign well.

3) Think deeply about the legacy of your building and how that differs from your annual giving

You have many things going for you as a congregation, with a beautiful space, healthy interactions, high engagement, robust programs and a settled minister that you love. In addition, unlike many congregations, you don't have the hurdle of having to reach agreement on whether to stay at your current site or move, nor are you facing the very time and labor intensive task of a building project.

The results of the electronic survey connected with the Next Steps Weekend, listed in Appendix D in more detail, show that more education about and support for a capital campaign needs to be done prior to a campaign launch. When the question was posed, "If a

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Capital Campaign is held to further the mission and goals of this congregation and to reduce the amount of the mortgage for the fellowship's home, and pledges can be paid over 3 years, would you contribute to a future Capital Campaign" the following results were generated from the 85 people who answered this particular question (4 people skipped the question):

- 48% said Yes
- 13% said No
- 39% added an optional comment (see Appendix D for the comments)

Most of the comments focused on lack of financial capacity to give, although a few people wanted more information or wanted money spent on other items first.

The legacy of your building, for use by your current congregation and for future generations, is a very meaningful gift that will allow CVUUF to continue to flourish, grow and provide the type of meaningful experiences that people articulated during the Next Steps Weekend. Following are some of the responses:

- 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
- 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

In addition, you are sophisticated about stewardship in your messaging and methods so you already have many of the tools and knowledge to be successful with a campaign.

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4) Begin Planning Now

For the financial feasibility study, you'll need to begin planning at least 2 months in advance of the interviews, in order to work on the list of invitees, the invitation letter and sign-ups and to get it on the calendars of participants.

If you want to move ahead on an ambitious timeline, you'll also need to begin simultaneously planning for the campaign by recruiting leadership and getting started on the timeline and task list.

Personal stewardship visits are one of the hallmarks of a successful capital campaign so you will need about 36 visiting stewards in order to limit each steward to four visits. You have recent experience using a personal stewardship model and therefore you are ahead of many congregations in that regard.

I encourage you to keep up your excellent transparency of process as you move into this next phase. Questions will arise, as they do with any project, so continue to listen and carefully consider responses. Remember that sometimes people just need a compassionate listener in order to feel heard and to process change and to deal with some increased concern over issues involving money.

V. Ambitious Abbreviated Timeline for Implementing Recommendations

(See Appendix E for more detailed timeline for the capital campaign team)

November/December 2017

- **Develop ambitious but realistic list of what you can accomplish w/o large debt**
- Prepare five-year ambitious but realistic financial plan
- Plan for upcoming Financial Feasibility Study
- Recruit capital campaign leadership
- Initial core campaign planning (timeline & tasks – see Appendices D & E)

January 2018

- **Prioritize ambitious but realistic list of what you can accomplish w/o large debt**
- Financial Feasibility Study
- Assemble entire Capital Campaign Team & continue planning

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

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March 2018

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

April 2018

- Launch Capital Campaign

Please note that the proposed detailed timeline, attached as Appendix E, has a very aggressive schedule to accomplish each step. For some of the months on the timeline weekly meetings will be needed. You may decide that you want to have a feasibility study in the spring and launch a campaign in the fall if you feel it will be difficult to quickly staff a robust capital campaign team. Careful, inclusive planning is key to obtain congregational trust and support for both the programmatic vision, which should be a key motivator for the debt pay down, and reallocation of resources from debt to programs.

VI. Written Survey Information

Eighty-eight congregants filled out an electronic survey, although some individuals skipped certain questions. The responses are summarized in Appendix C.

VII. Closing

Please let me know if you have any questions or discussion points about items in the report. Your congregation has many things going well and it was a pleasure to meet with your leaders, members and staff. Thank you for the opportunity to assist you—I look forward to helping you move forward to achieve your hopes and dreams as a congregation.

In spirit,



Kay Crider
Stewardship for Us

c: Rev. Nica Eaton-Guinn, Minister
Tom Wolf, President of the Board

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APPENDIX A

**Next Steps Weekend Agenda
for the Conejo Valley Unitarian Universalist Fellowship**

Friday November 3, 2017	
5:00 PM	Individual meeting with Rev. Nica, Minister
6:00 PM	Potluck dinner & Meeting with Board of Trustees & Minister
Saturday, November 4, 2017	
9:30 AM	Tour of building and meeting with building and grounds with Scott & Bart
10:00 AM	Meeting with Annual Stewardship team, potential Capital Campaign leaders, and sustainability Team (2 hrs)— Fellowship Hall
12:00 PM	Lunch break
1:00 PM	Meeting with Membership & Pastoral/Community Care, LCC & NN— Adult RE
2:00 PM	Meeting with Worship, Music & Choir – Fellowship Hall
3:00 PM	Meeting with Meeting with Lifespan Religious Education/Exploration, Chalice Circle, OWL leaders – Adult RE
4:00 PM	Meeting with Social Action/Justice— Fellowship Hall
Sunday, November 5, 2017	
9:15 AM	Sunday Service
10:20 -10:50AM	Meeting with Staff (Adult RE Room) Sam, Joel & Diana
11:00 AM	Sunday Service
12:15 PM	Pot luck finger foods and salads
12:45 PM	Presentation of info. & Recommendations to Congregation with Q&A;
2:00 PM	Wrap-up Meeting with Board, Minister, Stewardship, Finance, & Sustainability Team estimate end time latest 3:30

- Please arrange for childcare as needed. - Sam
- For Sunday's presentation, please provide a projector & screen for the presentation - Brian
- Potluck Finger foods & Salad & Dessert for the Sunday meeting with the congregation.
- The more attendees, the better the understanding of recommended processes.

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APPENDIX B

[CONGREGATION NAME]
[date of document]

SUMMARY LEVEL TEMPLATE FOR STRATEGIC FINANCIAL/RESOURCE PLANNING*

	YEAR-2	YEAR-1	CURRENT	YEAR+1	YEAR+2	YEAR+3	YEAR+4	YEAR+5
Number of members								
Number of donor households								
Average annual financial commitment (pledge)								
Total annual financial commitments								
Total capital campaign commitments								
Other revenue (itemize major sources and amounts)								
Total Revenue								
Staffing – number and details								
Payroll expense								
Debt service								
Contribution to reserves								
Outreach (social justice, denominational connection, etc.)								
Other expenses (itemize facility maintenance costs or capital project and one or two other cost elements)								
Total Operating Expenses								
NET INCOME/LOSS								
Average Sunday attendance (by service if multiple)								
RE enrollment								
Average re attendance (by meeting time if multiple)								
# Classrooms needed								
Long-term funds balances (itemize endowments, trusts, etc.)								
Any other key parameters								

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

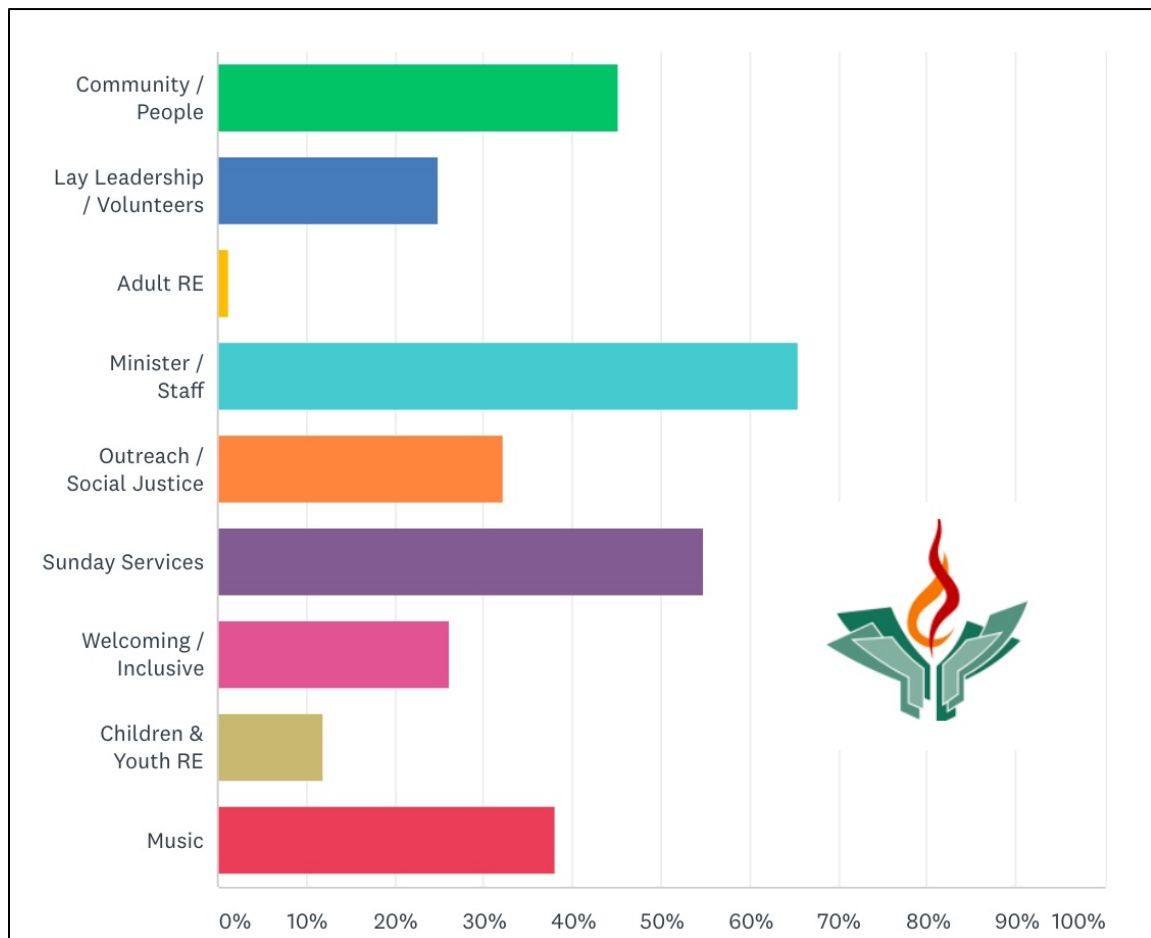
APPENDIX C

Results of Written Surveys

Eighty-eight surveys were completed by members and friends of the Conejo Valley Unitarian Universalist Fellowship prior to or during the Next Steps Weekend. Some individuals skipped certain questions. Following are the results.

1. What are the greatest strengths of CVUUF?

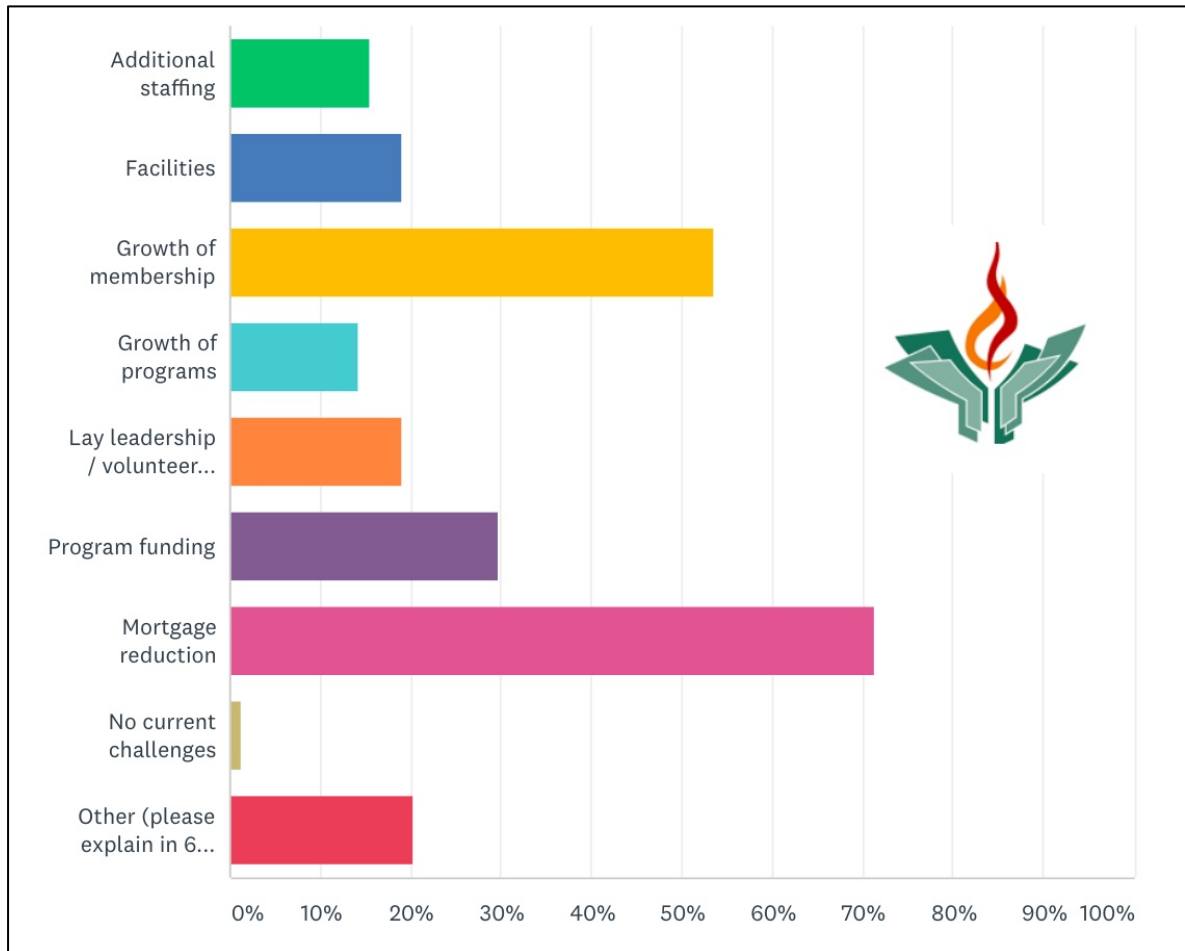
- ❖ Minister / Staff – 65%
- ❖ Sunday Services – 55%
- ❖ Community / People – 45%
- ❖ Music – 38%
- ❖ Outreach / Social Justice – 32%
- ❖ Welcoming / Inclusive – 26%
- ❖ Lay Leadership / Volunteers – 25%
- ❖ Children & Youth RE – 12%
- ❖ Adult RE – 1%



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2. Are there any challenges CVUUF needs to address in the next 5 years?

- ❖ Mortgage reduction – 71%
- ❖ Growth of membership – 54%
- ❖ Program funding – 30%
- ❖ Other: diversity (color/race); more young families – 20%
- ❖ Lay Leadership / Volunteer Growth – 19%
- ❖ Facilities – 19%

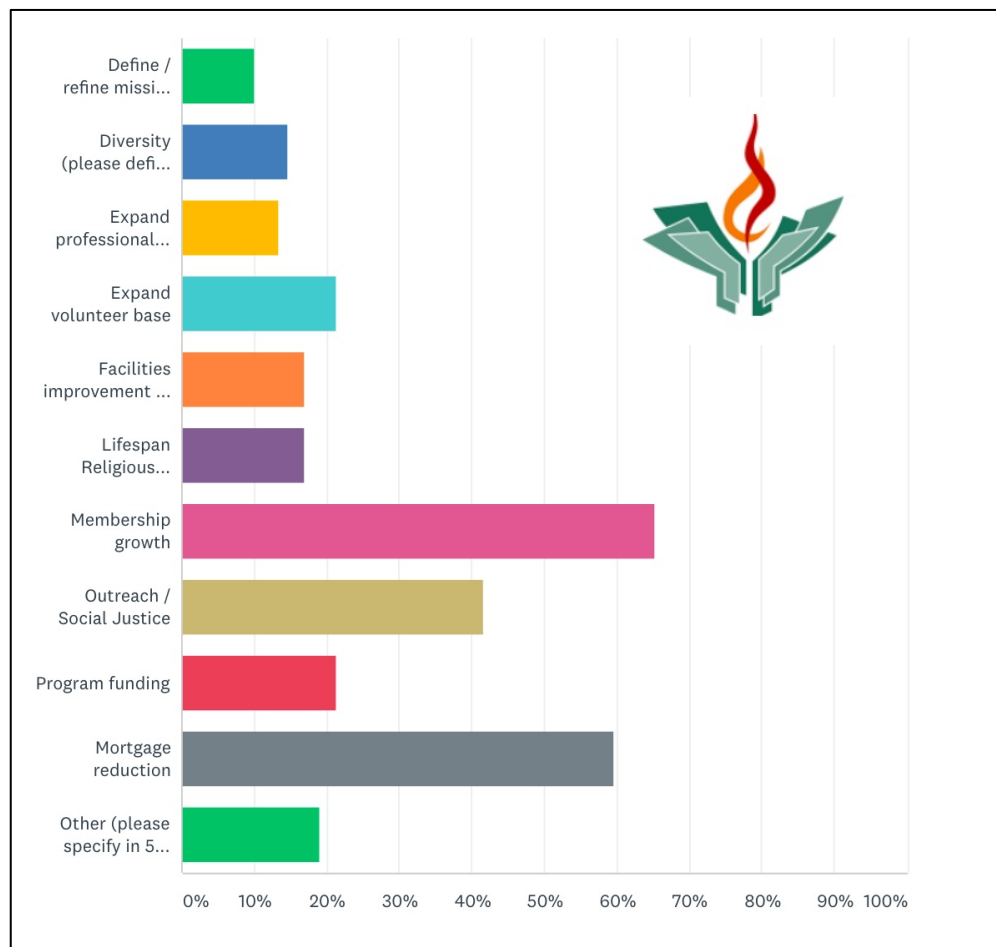


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3. What are the top priorities for CVUUF to further our mission going forward?

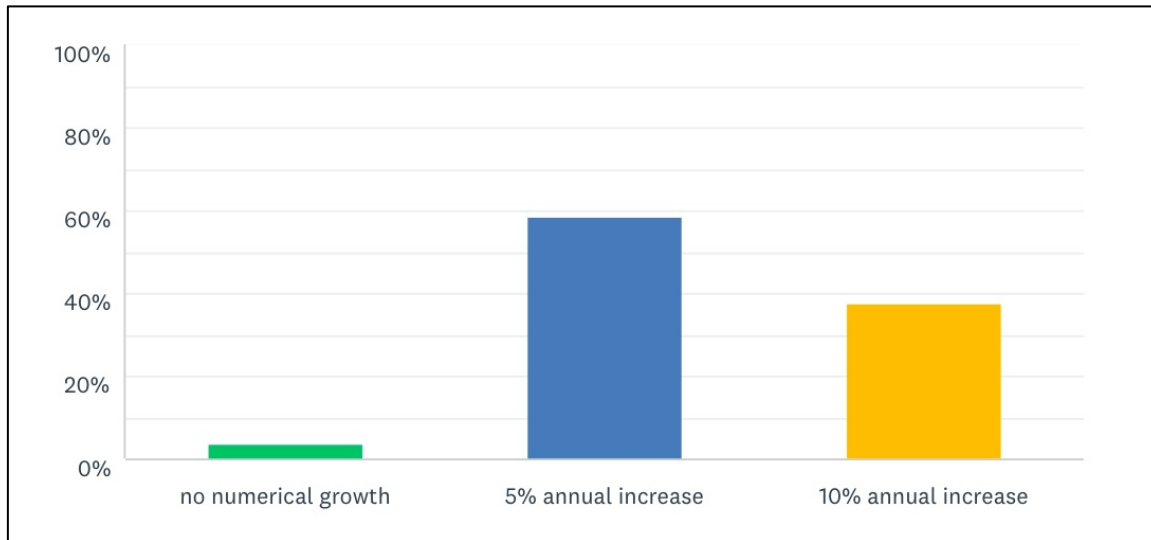
The most frequent responses were:

- ❖ Membership Growth – 65%
- ❖ Mortgage Reduction – 57%
- ❖ Outreach / Social Justice – 41%
- ❖ Program Funding & Volunteer Base Expansion (tie) – 21%
- ❖ Other: More diversity; fair compensation for staff; more young families & children; RE for youth; match spending to funding; “I don’t know the church’s priorities” – 19%
- ❖ Lifespan RE & Facilities improvement/expansion (tie) – 17%
- ❖ Diversity – 15%
- ❖ Expand staff – 14%
- ❖ Define / refine mission, vision, strategic plan – 10%



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4. Over the next five years, I would like to see our membership experience the following annual growth rate:



A majority of respondents favored 5% growth which is a realistic growth percentage based on historical data. Please keep this in mind when forecasting growth on your strategic financial/resource planning worksheet.

5. If a Capital Campaign is held to further the mission and goals of this congregation and to reduce the amount of the mortgage for the fellowship's home, and pledges can be paid over 3 years, would you consider contributing to a future Capital Campaign?

Yes — 48%

No — 13%

The following comments were provided by 39% of the 85 individuals who answered this question:

- I have already contributed significantly to the Vision Fund.
- Mortgage is the big issue. Growth is happening and I'm not so concerned about it.
- Yes but I would not be able to give much. We don't seem to be a very wealthy congregation
- Probably, but within the context of significant personal financial challenges (so not big \$)
- Sorry ... I am stretched pretty thin currently.
- I will continue to contribute what my limited budget will allow and off set with as much volunteer time as I can
- can't commit to it right now
- fund social justice FIRST, i.e. include it in the budget; have all leaders submit a budget
- I will if I have steady employment

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- We have given all that we can
- Yes but an effective capital campaign should also seek funds from elsewhere
- Not sure what's amount would be. I am not a member yet.
- Not sure yet....
- Maybe. We contributed significantly to a special capital campaign that should have been part I; I hope we're finally getting to part II.
- I am giving all the money I can. That is not my strength.
- It's hard to be maxing out by annually increasing my pledge and then feel pressured about supporting a capital campaign.
- Maybe
- Depends on my salary
- Yes, but the amount would not be large
- Not likely to increase my pledge per se, but would discuss contributing to such a campaign with my husband who does not attend.
- Would if I could but no
- I must increase my income in order to make pledge increases
- Planning to move, planning to contribute something
- I don't have enough information about the current mortgage or budget.
- Yes but I'm getting pretty close to maxed out
- My income is fixed but I would allocate a bit toward mortgage reduction
- I can't. I already give at the maximum I can afford.
- Would depend on the specifics
- I want to give to the Capital Campaign because lots is needed but I'm at capacity now
- Possibly, I already give a generous pledge
- I am a long-time member ... & a life-long UU



Capital Campaign TO DO LIST

1. Recruit combined campaign team

- a. Campaign co-chairs
- b. Leadership gifts chair
- c. Fellowship event co-chairs
- d. General gifts co-chairs*
- e. Publications co-chairs
- f. Communications/Publicity co-chairs
- g. Campaign treasurer
- h. Follow-up co-chairs
- i. Financial monitoring co-chairs

* The general gifts co-chairs must be supported by several group leaders and several team leaders. These individuals are not part of the combined campaign committee executive team but help with the managing, accountability and reporting of visiting stewards.

2. Create a detailed timeline (see draft provided separately)

3. Choose campaign theme

4. Prepare combined campaign materials

- a. Combined campaign brochure
 - i. Solicit graphics (logo; other artwork or drawings; photos)
 - ii. Obtain messages from minister, DRE, music director, board president, etc.
 - iii. Obtain any written testimonials from members for use in brochure
 - iv. Write campaign statement
 - v. Obtain narrative from building committee about the scope of project
 - vi. Obtain essential gifts chart from consultant
- b. Cover letter for mailing brochure (do not include pledge form with mailing)
- c. Combined campaign pledge form with envelopes
- d. Vanco automatic payment form
- e. Thank you notes with envelopes
- f. Orientation form/training guide for visiting stewards (Kay)
- g. Talking points for visiting stewards
- h. Visiting steward feedback form

5. Recruit visiting stewards

6. Recruit team leaders for visiting stewards

7. Review donor list

- a. Prepare comprehensive list of members/friends to be visited
- b. Determine assignments for visiting stewards

8. Train visiting stewards

- a. Prepare folders for visiting stewards, including assignments
- b. Hold 2 visiting steward trainings—excellent training is key to ensure people follow through with their visits and feel comfortable doing the visits – they’re fun!

9. Publicity for campaign

- a. E-newsletter articles
- b. Announcements from pulpit
- c. Stewardship moments on 4+ Sundays prior to launch of combined campaign
- d. Electronic news/email announcements
- e. Combined campaign web page design and implementation
- f. Blog?

10. Plan and host leadership/lead gifts event

11. Mail brochure with letter (do not mail pledge form)

12. Plan and host fellowship event (general campaign launch)

13. Follow-up

- a. Letter to those who refused a personal visit (letter)
- b. Calls to those who received a visit but have yet to return form

14. Financial Monitoring

- a. Treasurer works with capital campaign treasurer to ensure payments are being received as indicated on pledge forms
- b. Calls and/or letters to those in arrears
- c. Statements to all donors about the status of their payments

FASTRACK TIMELINE – CAPITAL CAMPAIGN TEAM
(debt reduction campaign, not a new building or renovation project)
November 2017 – June 2018
(draft 11-18-17)

November 2017

- If not yet identified, recruit campaign co-chairs
- Review Chapter 12 in *Beyond Fundraising*, by Wayne Clark
- Review To Do List (see separate document)
- Prepare list of potential of Capital Campaign team members
- Assign people to recruit various team members
- E-news for December about FFS

December 2017

- Reserve church room for FFS interviews in January
- Reserve date in February for congregational meeting to vote on capital campaign
- Discuss possible venues for Leaders/Leadership Gifts Event
- Recruit campaign team members
- Prepare list of FFS invitees with goal of 30 interviews / 20% of pledge households (minimum 36 to invite since some will not respond or be unavailable)
- Prepare and send out FFS invitation letter [and optional flyer, depending on campaign]
- Use sign-up Genius (or equivalent) to schedule interview times
- Reserve venue for Lead Gifts Event
- January e-news article preparation

January 2018

- Give notice of February congregational meeting to vote on capital campaign
- Meeting of entire campaign team to go over To Do list & assignments
- Meeting of those planning/finalizing details for Leaders/Leadership Gifts Event
- Publication/brochure co-chairs outline areas of brochure & request text
- Brainstorm & select campaign theme & logo
- February e-news article preparation
- Identify experienced stewards for quiet leadership phase of campaign

February 2018

- Set Capital Campaign Goal in light of FFS results
- Congregation votes to proceed with campaign
- Assign names to visiting stewards for Leadership Gifts phase
- Training / refresher for experienced visiting stewards for Leadership Gifts phase
- Brochure text statement deadline from minister(s), board chair, DRE, music director
- Newsletter article/E-news/blog on status for congregation
- Define details for main Fellowship event & campaign launch: food & drink; time of day; invitations; talks; music (General Events Co-chairs)
- Recruit remaining visiting stewards beyond those identified in FFS

February 2018 (cont.)

- Leaders/Leadership Gifts Event
- Communications co-chairs plan timing & recruit people for stewardship moments during March & April
- Recruit team leaders for visiting stewards from within VS pool for general gifts phase

March 2018

- Finalize brochure
- Prepare and finalize cover letter to accompany brochure
- Prepare pledge cards
- Newsletter article/E-news/blog on status for congregation
- Assign names/households for each visiting steward
- Assemble packets of visiting steward training materials / components and items to be assigned
 - campaign brochure
 - lists for each VS of contact info. for members/friends to be visited
 - training guide (Kay) & talking points (Kay & co-chairs)
 - thank you notes with campaign logo or church logo
 - pledge cards & envelopes
 - Vanco or other ACH authorization form
 - VS Feedback form
- Train visiting stewards
- Further preparation for Fellowship Event in April
- Assemble packets for mailing (brochure and cover letter, not pledge cards)
- Continue preparation for Fellowship Event
- Stewardship moments during services

April 2018

- Mail campaign brochure and cover letter
- Finalize last minute details for Fellowship Event
- Campaign Launch Sunday Service and Fellowship Event
- Face-to-face stewardship visits (2-3 week time frame)

May 2018

- Letter to those members/friends who refused a visit from a steward
- Calls to those who have not returned their pledge form

June 2018

- Letter to those who have not returned their pledge form
- Wrap-up publicity about campaign
- Celebrate Results with Congregation
- Thank broader campaign team
- Prepare written summary of campaign

August/ September 2018

- Define responsibilities and schedule going forward for smaller monitoring team
- Develop strategy for new members

Note: Resist the temptation to have only a few people run the campaign. Recruit different people for each area of the campaign planning; there are many things to be accomplished each month.