



**Unitarian Universalist Fellowship of Manhattan**



# **Next Steps Weekend Report**

## **Unitarian Universalist Fellowship of Manhattan**

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Manhattan, KS 66505

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## INTRODUCTION AND SUMMARY

This report presents the results of a Next Steps Weekend (NSW) engagement with the Unitarian Universalist Fellowship of Manhattan, KS (UUFM). The project was conducted by Barry Finkelstein, a Unitarian Universalist (UU) Congregational Stewardship Consultant with *Stewardship for Us*. This report is based primarily on an intensive weekend on site, September 20-23, 2019.

### *Goals for Stewardship Consulting*

The goals of the Fellowship in engaging a stewardship consultant were:

1. Find ways to accommodate growth through financing expansion of existing facility or moving to another facility
2. Organize our stewardship in order to maximize our ability to fund our operating budget (to bring the pledge dollars in line with our current budget)
3. Organize a capital campaign for achieving these goals

### *Highlights of Results and Recommendations*

The major result of the NSW process is that UUFM is well-positioned to move toward a capital campaign to finance a major facility expansion or relocation to a new facility. The Fellowship has numerous strengths that will serve it well as it proceeds.

Following are the major recommendations presented in the report. These will enable UUFM to strengthen stewardship and plan and carry out a successful capital campaign:

- **Communicate and engage:** Continue the conversation begun during the Weekend, deepen relationships by sharing your dreams and passions with one another, and talking about the financial commitments it will take to make these dreams a reality.
- **Create a shared vision:** decide who you want to be and what would be an ideal future for UUFM.
- **Research facility options:** determine what is likely feasible and affordable at the current site and elsewhere, either through either purchase or building of a new facility. Reach a decision about a course of action that will be the basis for defining a capital project to be assessed in a Financial Feasibility Study.
- **Develop a long-range, comprehensive financial plan:** Identify the resources needed to support the hoped-for move to a new location as well as sustainable annual operations over the next five years.
- **Strengthen and institutionalize stewardship:** Plan and carry out a highly effective campaign in the Spring 2020, whether that is an annual campaign or a combined annual/capital campaign. Rely primarily on personal one-on-stewardship conversations, engage many volunteers, and reach out to all participating members and friends.

The balance of this report describes the NSW process and provides more detail about findings and recommendations. Several appendices provide additional information.

## BACKGROUND

### *Basic Data*

Name and Mailing Address of Congregation	Unitarian Universalist Fellowship of Manhattan PO Box 910 481 Zeandale Rd Manhattan, KS 66505
Website Address	Uufm.net
Dates of Visit	September 20-23, 2019
Minister/Program Staff	Rev. Jonalu Johnstone, Developmental Minister Sandy Nelson, Religious Educator (and volunteer bookkeeper) Susan Turner, Administrator
Point of Contact	Mark Mayfield, Board Chair
Number of Members	132
Children & Youth Registered for RE	60
Fiscal Year	June 1 to May 31
Annual Operating Expense Budget	\$183,000 (FY2020)
Annual Financial Commitments (2019-20 Pledges)	\$130,000 = 71% of operating expenses; 57 pledging households
Average Financial Commitment	Mean: \$2,286 Median: \$1,800
Endowment (Permanent Funds):	\$755,500, unrestricted endowment \$ 65,500, restricted endowment
Other Assets	\$ 6,500, building/capital fund
Approach to Annual Budget Drive	Stewardship Conversations and Telephone Appeal
Most Recent Capital Campaign	2014 to fund full-time ministry

### *Advance Contacts and Preparation*

In advance of the weekend visit, Barry had several email exchanges and telephone calls with UUFM lay leaders and Rev. Jonalu Johnstone, Developmental Minister. He spoke with Rev. Phillip Lund of the UUA MidAmerica Region. He reviewed and analyzed extensive materials provided by the Fellowship, including information on finances, stewardship and pledges, history, ministries, and activities. He reviewed additional materials in recent annual reports and on the Fellowship website.

### *Visit Schedule and Process*

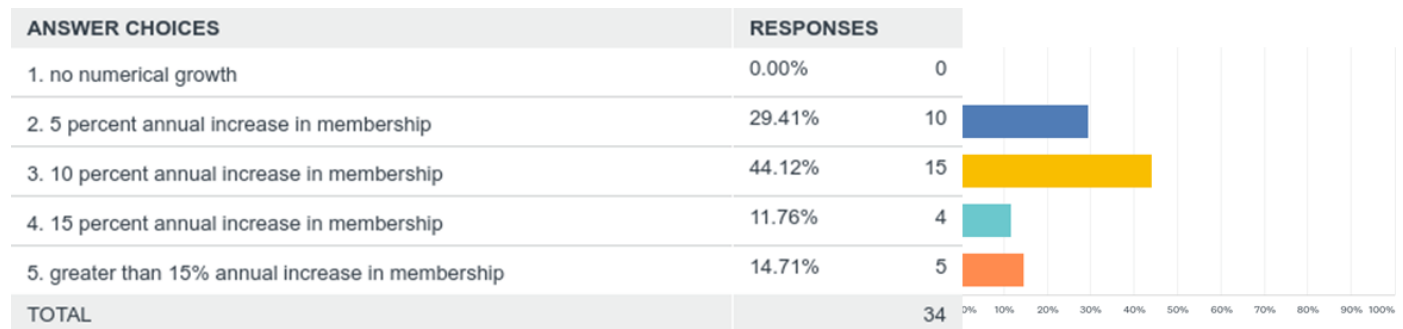
The schedule for the weekend visit is presented as Appendix A. During the Friday and Saturday sessions, Barry toured the facility and met with approximately 40 people, an excellent turnout. He met with staff, board members, and representatives of key committees and constituent groups, including past board chairs, stewardship, finance, planned giving/endowment, facilities, membership, RE and youth, leadership development, music, and social justice. Barry led a stewardship workshop on Saturday afternoon attended by 31 people, shared the sermon time with Rev. Jonalu during the Sunday morning worship service (outline provided as Appendix B), and summarized his findings and recommendations and answered questions at a very well attended (54 people) open forum following the service.

## DATA AND ANALYSIS

### *Survey Results*

Thirty-four people who attended the Friday and Saturday sessions completed a brief anonymous survey via Survey Monkey. The survey asked people to identify important milestones in the life and history of the Fellowship, list the Fellowship's strengths and challenges, and indicate a preference for growth. Appendix C includes word cloud images reflecting the responses to the three open-ended questions. Highlights of the results:

- **Question 1, Milestones** most commonly cited concerned building-related events, full-time/developmental ministry, founding of the Fellowship, programmatic milestones (social justice, adult and children's RE, year-round worship and programming, Soul Matters), and part-time ministers.
- **Question 2, Growth Preference:** all 34 people who completed the survey would like to see membership growth, a positive indicator for a capital campaign. As shown in the graph and table in Figure 1, the predominant response was a preference for a 10% annual increase in membership. The Figure shows the distribution of responses to the question, "Over the next five years, I would like to see our membership experience the following annual growth rate:"



**Figure 1: Growth Preference from Survey**

- **Strengths** most often cited were community; social justice, activism, and impact; the people (their creativity, talent, commitment); minister; accepting; diversity; financial assets; children and youth programming including OWL. A few quotes of note: “able to integrate people quickly”, “letting leaders lead” and “no factions.”
- **Challenges** most often cited were finding a new minister, finances especially long-term sustainability, facilities, growth, location, improving processes, and burnout. A few quotes of note: “we have an expectation that money will solve problems” and “we need more overt optimism.”

The survey responses are generally consistent with the discussions I had during my visit, and there were no red flags among the milestones or challenges.

### *What is Special at UUFM?*

During the open workshop on Saturday, September 21, each participant was asked to pair up and share a story about a powerful moment they experienced at the Fellowship -- a time when something memorable and moving happened for them personally. They were then asked to talk about what is special here that enabled those moments to occur. UUFM’s special characteristics, which should be talked about regularly, are:

- |                                    |   |
|------------------------------------|---|
| • Honor all living beings          | • Open minds, diverse sources               |
| • Learn the truth                  | • Radical inclusiveness                     |
| • Cross-generational               | • Shared values throughout the congregation |
| • RE Program (several mentions)    | • Acceptance of differences                 |
| • Genuine acceptance of children   | • Joyous memorials                          |
| • Take care of things              | • Challenge each other                      |
| • Community (several mentions)     | • Friendship                                |
| • Common bond                      | • Lift each other to do better              |
| • Courage and commitment           | • Intellectual stimulation                  |
| • Coming together for gay marriage |   |

### *Brainstorming About Money*

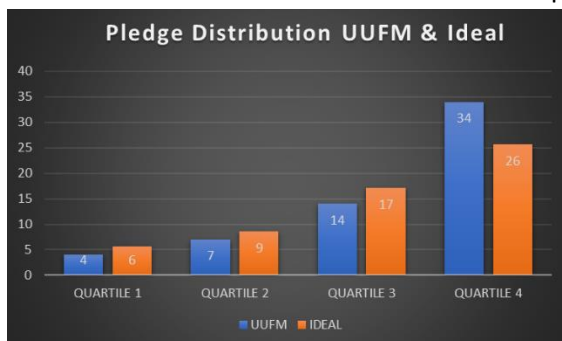
Also during the Saturday afternoon workshop, participants were invited to participate in a brainstorming exercise and share their immediate reactions to the word “money.” The responses, shown in Figure 2, indicate a complex relationship with money. The responses were roughly evenly divided among the three categories. Quite a few of the positive responses reflect an evolution and maturity in attitudes toward money, for example, feel better now than ever, learned how to stop worrying. Others emphasized money as a tool to be used and controlled. The negative responses not surprisingly reflect stress and worry, debt, and bills. The exercise demonstrated that people were comfortable sharing their anxieties and uncertainties, a good step in learning to talk with one another about money. Recognizing the baggage we carry about money can be helpful as we engage with one another about the financial aspects of supporting the Fellowship and carrying out a successful capital campaign.

Positive	Negative	Neutral/Ambiguous
<ul style="list-style-type: none"> <li>• Powerful tool</li> <li>• Own it, don't let it own you</li> <li>• Not to want too much</li> <li>• Feel better now than ever about it</li> <li>• Learned how to stop worrying about it</li> <li>• Retirement and grandchildren</li> <li>• Early planning and saving</li> <li>• Reduce wants</li> <li>• How much can I give to political campaigns</li> <li>• Travel</li> <li>• Invest early and often</li> </ul>	<ul style="list-style-type: none"> <li>• Student loan debt</li> <li>• Never had enough</li> <li>• Stress (3 mentions)</li> <li>• Medical bills</li> <li>• Yikes</li> <li>• Income adjustments (down)</li> <li>• Worry</li> <li>• Don't know what I'm doing</li> </ul>	<ul style="list-style-type: none"> <li>• Needing more</li> <li>• Will there be enough?</li> <li>• What is the purpose?</li> <li>• How long will we live?</li> <li>• Will I need long term care</li> <li>• Kids in college</li> <li>• How much need and how much to leave children</li> <li>• Do what I must</li> <li>• Uncertainty</li> <li>• Consumption</li> </ul>

**Figure 2: Brainstorming Results about Money**

### *Analysis of Annual Financial Commitments*

The distribution of UUFM's annual financial commitments for 2019-20 is presented in the graph below and Table 2, along with a comparison to an ideal distribution. As shown, the UUFM distribution is modestly skewed. Four families that comprise the first quartile represent 7% of the pledging households and account for 25% of the total dollars pledged, and seven households or 12% account for the next 25%. Thus, half the total dollars are provided by eleven households or 19%. We would ideally like to see 10% of the households in the first quartile and 15% in the second, providing a more equitable



funding stream and reducing risk and vulnerability to the congregation from dependence on a few large commitments.

At the other end of the distribution, the fourth quartile includes 60% of the households, and 11 households or 19% contribute \$500 or less. In addition, a sizable number of households (approximately 30) do not pledge at all. It should be possible to encourage more equitable giving through education, communication, inspiration, and a more energetic and focused annual

stewardship campaign (See Recommendation 5 below)

The 80<sup>th</sup> percentile, shown in the second column from the right in Table 2, can be a useful benchmark to offer congregants. This is the level which might be expected from a highly committed family with typical resources in the Manhattan area. For UUFM, the 80<sup>th</sup> percentile pledge is \$3,297.

A review of year over year changes from 2018-19 to 2019-20 reveals some positive trends as mean, median, 80<sup>th</sup> percentile, and total are all up. Average and median pledges are solid and reflect the kind of commitment required to sustain a Fellowship of your size with full time ministry and its own facility.

	UUFM	IDEAL	UUFM %	IDEAL %	High Pledge	Mean Pledge	Median Pledge	Low Pledge	80th Percentile	TOTAL
QUARTILE 1	4	6	7%	10%	\$9,000	\$8,325	\$8,250	\$7,800		\$33,300
QUARTILE 2	7	9	12%	15%	\$6,200	\$4,614	\$4,500	\$3,600		\$32,300
QUARTILE 3	14	17	25%	30%	\$3,300	\$2,522	\$2,500	\$2,000		\$35,302
QUARTILE 4	34	26	60%	45%	\$1,836	\$919	\$900	\$100		\$29,404
No. \$10K and up	0		0							
No. \$5K to \$10K	6		11%							
No. \$2K to \$5K	19		33%							
No. \$500 and under	11		19%							
Zero pledgers	~30		33%							
<b>TOTALS 2019-20</b>					\$9,000	\$2,286	\$1,800	\$100	\$3,297	\$130,306
<b>TOTALS 2018-19</b>					\$10,000	\$1,921	\$1,320	\$60	\$2,880	\$117,197
<b>Percent Change</b>					-10%	19%	36%	67%	14%	11%

**Table 2: UUFM Pledge Data FY 2019-20**

## FINDINGS AND RECOMMENDATIONS

### *Readiness for a Capital Campaign*

Figure 3 is a “balance sheet” showing positives and challenges for UUFM in terms of readiness for a capital campaign. The balance sheet indicates that you are ready to move toward a capital campaign as the positives outnumber and outweigh the challenges. Moreover, the effort to carry out a successful campaign will help overcome the challenges. An aggressive timeline would be a combined annual/capital campaign in the Spring of 2020. The timeline should be refined as the recommended actions described below proceed.

STRENGTHS	CHALLENGES
<ul style="list-style-type: none"> <li>How far you have come since your official charter in 1957</li> <li>This facility and the extensive work and resources you have invested</li> <li>Financial resources, including an endowment that is more than three times your annual budget, and annual finances that are stronger than you let on: while you use endowment funds in some years to balance the budget, this use is within reasonable limits and consistent with policy</li> <li>Ability to capitalize on Developmental Ministry, making progress toward goals and recognizing the value of full-time professional leadership</li> <li>Demonstrated willingness to change and try new things</li> <li>Commitment to RE and multi-generational programming and community</li> <li>Investment in and support for leaders, including relying on UUA resources for leadership development; all of the last 20</li> </ul>	<ul style="list-style-type: none"> <li>Need to juggle several things at once (search plus completing the developmental ministry and building/capital campaign work); it will be a challenge to find the resources and energy</li> <li>Stewardship infrastructure that will serve you more effectively for annual campaigns and a capital campaign</li> <li>Common vision to guide decision-making about facility direction</li> <li>Unease around money but willingness to talk about it (based on Saturday workshop)</li> </ul>



<p>board chairs are still here (except one who left to become a minister)</p> <ul style="list-style-type: none"> <li>• Membership growth over the last three years</li> <li>• Openness to new and young people in leadership roles</li> <li>• Decent pledge results (mean, median) with potential upside</li> <li>• Committed leadership</li> <li>• New-found presence in the community, increasing visibility and impact</li> <li>• Commitment to Social Justice: Welcoming Congregation, racial justice, Happy Kitchen, GI Rights</li> <li>• Generosity as evidenced by giving away the Sunday offering and being an Honor Congregation - full UUA APF/GIFT contributor</li> </ul>	
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**Figure 4: Capital Campaign Readiness Balance Sheet**

### *Recommendations*

The following are specific recommended actions to strengthen stewardship and prepare the Fellowship for a successful capital campaign.

#### **1. *Communicate and Engage:***

Continue the conversations begun during the Next Steps Weekend. People shared deeply personal stories about their experiences at UUFM. Sharing such stories deepens connections to one another and to the congregation, which in turn leads to greater commitment of time and money. Keep the conversation going by making this report widely available and providing opportunities to broaden the discussion. Use electronic communications and social media as well as small and large group gatherings for this ongoing conversation. Help one another get over the awkwardness about talking about money in Fellowship.

And there's nothing more effective than talking with one another during coffee hour and other informal settings, sharing the special characteristics of UUFM and how it has transformed your lives. Share your dreams for the future of UUFM and its mission and ministries, and the opportunities presented by the prospect of enhanced facilities, and talk about the money it will take to get there and how we can sustain a culture of joyful giving.

#### **2. *Create a Common Vision***

Carry out a rapid process for defining a vision of the future of UUFM and developing broad consensus for that vision. Address the core question of who you want to be as a congregation and what characteristics will be essential to achieving that vision. Once you decide who you want to be, you can then determine whether it would be best to remain in your current location or move.

Stewardship for Us has a process called Searching for the Future for developing a common vision and strategic goals for moving toward the vision. The magic of the process is that most or all of it takes place in one intense weekend and involves a high percentage of congregants. Appendix D

summarizes the process, which is also discussed in *Beyond Fundraising* by Wayne Clark. You might also confer with Phil Lund, your UUA Congregation Life Consultant, to explore options he might suggest.

### **3. *Facility Research and Definition***

Determine the likely range of facility options with the potential to support your vision at a cost you can afford. This entails determining what is possible at your current site: is there an affordable concept that would provide the parking and space you will need? It also entails researching the real estate market in Manhattan to determine what might be possible in terms of buying an existing facility or buying land and building. Consider a broad range of facility options. This task, coupled with the vision results, will provide the basis for a capital campaign. Before asking for capital pledges, it is important to have a reasonable level of assurance that you can accomplish your goals for the amount of funds you are likely to be able to raise.

Once you have a range of feasible options, engage the congregation in a process to reach a decision about whether to remain at the current location or move. Once you have reached this fundamental decision, you can then proceed to define the capital project and proceed with the steps toward a capital campaign.

4. ***Develop a Long-range Financial and Resource Plan*** – Create a long-range, comprehensive financial plan, exploring the financial impact of different scenarios for facility options and costs, staffing models, growth possibilities, etc. Identify the resources needed to support your vision over the next five years at least. The plan should present all assumptions about annual budgets and required pledging to support your goals and objectives, providing visibility into what it will take to achieve balanced budgets without relying on your endowment. Appendix E is a template you can use to get this started, tailoring it as needed. Include one-time and ongoing facility costs, balanced with revenue from the capital campaign and the potential for some level of mortgage financing. Consider any potential changes in staffing needed to support anticipated growth and mission and program needs. Use this process to show all of the resources available for capital investment and operations including the various restricted and unrestricted funds. Complete an initial version of the plan now and refine as decisions are made and financial implications become clear.

Present the financial plan to the congregation in various ways and discuss assumptions and implications for capital and annual pledging; this can be an excellent vehicle to encourage members to think about their financial commitments in a new light, and also to develop a better understanding of how finances work for the Fellowship. Coordinate with the various programs and constituencies to ensure that their resource needs are reflected and to inspire generous giving for annual and capital campaigns from all parts of the Fellowship community.

### **5. *Plan and carry out a successful campaign in Winter/Spring 2019-20***

If the above activities progress rapidly, it may be possible to conduct a successful capital campaign this coming Spring, combined with the annual campaign. If more time is required, plan and conduct an excellent annual campaign, using the process to develop an effective stewardship infrastructure that will serve you well for a capital campaign the following year and for many years of annual drives. Implement best practices as documented in the book *Beyond Fundraising*, by Wayne Clark of the UUA.

Base the campaign almost entirely on one-on-one, personal stewardship visits conducted by trained and well-supported visiting stewards. This is the most effective way to engage members in thinking deeply about their connections to the Fellowship and about their financial commitment, whether to annual or capital fund drives. The visits should be preceded by a period of congregational engagement and information, including informing people about the process and encouraging them to welcome a stewardship visit. Other ingredients in a successful annual campaign include:

- Adopt a giving guide and message, along with a case for generosity.
- Take advantage of the timing to encourage visits: nearing the end of the developmental ministry and thinking about a new settled minister; work on visioning; and likely capital campaign. These are good reasons to talk with one another in these visits.
- Conduct the campaign rapidly, completing the visits in a matter of weeks, eliminating the current tail end of the process that drags on
- Demonstrate leadership commitment to the campaign and to being generous contributors
- Organize and plan, developing a schedule of all key activities and milestones including communications and other activities leading up to a Kickoff Sunday
- Include a leadership event to thank and recognize generous contributors and perhaps other leaders and accept early pledges to set a positive tone for the formal campaign kickoff
- Recruit lots of people, including new people and those not normally involved in finance – go beyond the usual suspects!
- Engage all constituent groups in the Fellowship: music, RE, social justice
- Make an effort to reach out to the families that do not pledge, explain the importance of pledging as the primary source of reliable funding for the Fellowship and the basis for annual (and capital) budgeting, compensation-setting, etc. The board and staff cannot run the Fellowship on the basis of possible plate contributions.

If the campaign will include a capital fund drive, additional steps will be required including a Financial Feasibility Study to assess the level of support for a specific plan.

#### **6. Other Recommendations:**

Pursue the following in support of long term financial and stewardship health:

- Arrange for an outside review of your financial records and controls, a good practice generally that will contribute to member confidence about control over capital funds. Consider arranging a swap of review services with a neighboring congregation as an alternative to hiring a CPA.
- Consider changing your fiscal year to the more common July 1-June 30 which provides an extra month in the Spring to conduct the pledge drive and create a budget.
- Modify your income statements and budgets to show contribution from the endowment as an expected component of income when that is planned, instead of showing budget deficits.
- Provide information for members on UUFM finances as you have begun in the October newsletter.
- Continue to expand use of electronic pledging and giving, credit cards, text to give, acceptance of publicly traded securities, Qualified Charitable Distributions, etc. Make it easy to give for annual and capital campaigns as well as during Sunday services and other events – and make sure people know the options.

## PROPOSED STEWARDSHIP CONSULTING SUPPORT

Table 3 presents recommended consulting support that will enhance your likelihood of success. Continuing to work with your stewardship consultant will help you plan and carry out the specific recommendations and tasks presented above. As important, it will help you build and sustain enthusiasm, momentum, and energy throughout the leadership and the congregation.

Support	Scope of Work	Estimated Level of Effort & Cost
Visioning – Searching for the Future (SFTF)	<ul style="list-style-type: none"> <li>Tailor the SFTF process in Appendix D to create the vision and other outcomes needed to support decision-making</li> <li>Run the process in an intensive weekend, beginning with training facilitators on Friday evening, overseeing several small groups on Saturday, and facilitating a wrap up session</li> </ul>	24-28 hours == \$3,120 to \$3,640 plus travel (estimate \$1,000 to \$1,200)
Spring 2020 Campaign Support (Annual or Combined)	<ul style="list-style-type: none"> <li>Support for campaign planning</li> <li>Regular phone/video conferences plus one on-site visit to train visiting stewards</li> <li>Review of materials, including the long range financial plan</li> <li>Follow-up lessons learned analysis to strengthen ongoing stewardship</li> </ul>	20-24 hours == \$2,600 to \$3,120, plus travel for one visit (estimate \$800 to \$900)
Financial Feasibility Study	<ul style="list-style-type: none"> <li>Key preparatory step preceding a capital/combined campaign, assesses the level of support and likely funds to be raised for a specific project</li> <li>Based largely on in-person, confidential one-on-one interviews (likely 20 interviews)</li> </ul>	40 to 44 hours == \$5,200 to \$5,720 plus travel (estimate \$1,200 to \$1,500)

**Table 3: Recommended Consulting Support**

Labor charges are based on an hourly rate of \$130, and are billed only for time spent; each contract we negotiate will have a ceiling or not-to-exceed amount, and I will work with you to manage costs within the ceiling. We charge for up to six hours for one-way travel time for each visit. Keeping these costs in perspective, if UUFM raises \$500,000 (just over 3 times this year's annual pledge total) for a capital campaign, the maximum consulting costs will be approximately 3% of the total raised.

## CLOSING

I enjoyed my weekend at UUFM very much. The stories I heard about the Fellowship and its impact on peoples' lives and on the life of the surrounding community were inspiring. You are blessed with wonderful assets and strengths, including excellent and dedicated leaders and a talented membership, which will form a solid foundation for strengthened stewardship and a capital campaign.

It has been a pleasure and an honor to be with you for the Next Steps Weekend, and I welcome the chance to continue to work with you.

Faithfully submitted,



Barry P Finkelstein  
*Stewardship for Us*  
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Delivered to:  
Mark Mayfield, Board Chair  
Rev. Jonalu Johnstone, Developmental Minister

Copy to: Rev. Phillip Lund, UUA MidAmerica Region

## Appendix A: Next Steps Weekend Schedule

### Friday Sept 20

5:30-6 PM	Facility Tour with POC
6:00-6:30	Meet with Rev. Jonalu
6:30-7	Meet with staff: Jonalu, Sue Turner (Adm), Sandy Nelson (RE)
7-8:30	Reception with light snacks: POC, Board, Jonalu, Stewardship, Other Leaders

### Saturday Sept 21

9-10 AM	Recent Past Board Chairs
10-11	Financial, Stewardship, Endowment
11-12	Facilities
12-1 PM	Other leaders: Social Action, Membership, RE, Communications, Sunday Services, Circle Suppers, Visioning
1-1:45 PM	Minister and Board (Working Lunch)
2-3:15	Open facilitated workshop with everyone
3:30-4	Brief Recap with POC, board
4:30	Meet at prospective downtown building for short tour

### Sunday Sept 22

10:45 AM	Barry's Participation in Worship Service
12:15-1:00 PM	Barry's Presentation of Preliminary Report
1:00ish-1:30	Wrap-up and Q&A with Board and Minister

## Appendix B: Worship Service Remarks

It turns out I was a Unitarian Universalist pretty much my entire life, even though I did not know our faith existed until I was nearly 30 years old. The first time I found my way to a UU church, which was in Arlington, VA, I was amazed that there was a faith community that lived the values I had been taught from earliest days.

It took exactly one visit to realize that this was for me. The progressive, inclusive values were immediately evident, as was the notion that religion need not conflict with science, reason, and common sense.

While I felt at home in the UU church right away, it took a while for me to find my place. Two things changed that for me, and changed my life.

The first was social justice, which is what really got me hooked. Sound familiar? I became active in the Social Resp Committee which was about to embark on two major SJ projects but the time my wife Roberta and I were co-chairs – little did we know! The first entailed serving as a host church for a temporary roving homeless shelter, and the second was declaring our congregation a sanctuary for central American refugees. What I loved about these projects is they involved many members of the congregation and they went beyond charity to justice – the homeless shelter project for example, was intended to push the county to address the problems of chronic homelessness, resulting in the building of a new shelter.

The second thing that happened early in my tenure at Arlington was getting a canvass visit by a member of the board. I was still a very new member and pledging very little. I knew pretty much nothing about the running of the church or how it was financed. When John called and offered to come by to talk about the church and discuss our pledge, I was honored – and frankly somewhat surprised. We had a rich and inspiring conversation, and looking back, I would say this conversation was one of the seminal moments in my becoming a UU.

So today, my spirituality and faith commitment revolve largely around social justice and stewardship – and I believe the two go together perfectly. Think about the impact we – a small denomination – have had on issues like marriage equality, racial justice, reproductive and women's rights, mass incarceration, environmental justice and climate change, immigration, police violence, anti-white supremacy. I heard passionate stories about your work for marriage equality and one super party to cap it off.

Think also about the impact of our OWL program in helping our youth and adults of all ages learn to love one another responsibly. I heard much about this here at UUFM.

This is where my passion for stewardship comes in. What does it take for us to be the transforming force we are and hope to be in our lives and in the world? One of your developmental goals is to *“Turn our vision of being a strong, visible, socially active presence in the community into strategic action.”* Well one thing I know it takes is stewardship – the commitment of our gifts and our calling – all of our gifts including our time, our presence, our talents, our energy, and yes, our money. You have seen this in the form of Jonalu's focus on social justice and community involvement – your presence has grown tremendously as a result.

In addition, think about the value of this congregation to each of you on a personal level. I heard moving stories over the weekend about lives transformed and people lovingly supported here. This is your community, your family. We – you -- have so much to be proud of. And think of how far you have come – extraordinary accomplishments for a congregation your size.

Now imagine how much we could accomplish with additional resources, with additional investment. You are seeing that in the value you're getting from Jonalu's ministry – which required digging deeper to support full time ministry. That's why I work on stewardship – to help you and other UU congregations take our value proposition to the next level, to commit a higher level of resources so we can have even greater impact, which is so much needed today.

I loved being with you this weekend. I came out of every session energized and alive. [more...]

This is a pivotal time for this Fellowship. You have important choices ahead of you over the next two years: choosing a new settled minister and determining how best to provide the facilities that will meet your evolving and expanding needs. And figuring out how to sustain it all financially. The Soul matters theme and sermon title for today could not be a better fit: Goals, Yearnings, Expectations. That's what you are to be about for the next little while – figuring out what these are and coming up with a common vision of the future that reflects your deepest and grandest dreams.

When you invited me here, you asked me to consider how a capital campaign might fit into your plans and I will do that in my report – stick around.

I have to tell you that I love UU capital campaigns – once a generation opportunity to give back and invest in the future. They tap into deep spiritual needs of UUs as individuals and our faith communities. just as much about community-building as about building-building. What wonderful, magical outcomes might we expect?

I find that UUs are more generous and more committed than we might think. We have a bad rap of being among the wealthier denominations while being among the least generous. But that's been changing over the years as we've learned to talk to each a little more effectively about money, and come to realize how much more effective we could be with more resources. And I've also seen that UUs are ready, capable and eager to step up for capital campaigns. Many of us are seeking outlets for our generosity and our philanthropy in our UU congregations, looking for a way to invest in this faith we love so much and the congregations that embody that faith. Capital campaigns respond to that desire.

In addition, building programs and CCs are tremendous community-building opportunities. They build confidence and strengthen governance and leadership, provide opportunities to involve new people, long-time members, and everyone in between. They help strengthen covenants. They provide opportunities for people with high economic capacity to participate at high levels, and also for people with limited means to contribute in meaningful ways. Involve everyone, talk with everyone, get everyone pumped up. Everyone can play a part.

Why now? For UUism in general, strong uptick in interest enthusiasm, since the 2016 election and this past week. What are we called to do? And how does a capital campaign fit in? How does it further UUFM's mission? UU in a time such as this – post-election. Families separated at the border, kids kept in detention; environmental degradation; continuing gun violence; the continuing Justice Kavanaugh debacle. We are called to stand in love and justice, to be present and accounted for, to be a safe place



for vulnerable people, to be a source of strength and love to stand up to hate and bigotry and fear. We are called to be a people of faith who respect the worth and dignity of all people – women, LGBTQ, immigrants. We respect the interdependent web. Our values are in demand. Our faith is in demand.

I invite you to think about how you got to this special place and time. How many of you were here when you bought this property and moved here? When you dug deep and built this beautiful sanctuary? When you dug deep again and paid off your mortgage? So let me ask you: Are you ready to take the next leap of faith to invest the resources needed for the next generation of UUs? Don't we owe it to those who came before and more important to those who will come after us?

Think about your goals, yearnings, and expectations. Build the future, based on the best of the past and the best of the present. What can UUFM be at its best for these times? Can you paint a compelling vision of a future of the Fellowship that changes the world and transforms lives? I can say that I know that you can do it. This can be your time to dig deep and find the courage, the faith in one another, and yes the money, to leap forward. If you want it, you can do it.


I have assisted around 20 UU congregations in capital campaigns over the past decade. The keys to success are consistent: a common vision and goals that enables us to make decisions, passionate commitment, willingness to engage with one another in deep and honest and sometimes challenging ways, a willingness to talk with one another about money, and a willingness to stand up and say **Yes**, we can do this, we will do this, we will find a way.

The people I met here at UUFM this weekend have all the attributes those other congregations have. You are passionate, excited, committed, engaged with one another, walking together on this great if a little scary journey. You challenged me with great questions. You challenged one another to clarify where you are and where you are heading. I can't wait to see you take the next steps and continue to challenge one another as you hone your vision and decide just where and how far you want to take this congregation. You are the ones, and I know you can do this.

I ask you – is there a better investment you can make? Is there a better way to use your financial resources to promote your deepest values? Join me for further conversation about how you can do this.

I leave you with these words by architect and city planner Daniel Burnham. "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 a noble, logical structure, once erected, will never die, but long after we are gone will be a living thing. Remember that our children and grandchildren are going to do things that would stagger us. So, make no little plans." Amen.

## Appendix C: NSW Survey Form and Word Cloud Results



Stewardship FOR US  
Building Cultures of Generosity and Commitment

Next Steps Weekend Survey -- UU Fellowship of Manhattan, September 20-22, 2019

1. What are up to three defining milestones or events in the history of UUFM? Please use no more than 5 words for each.

1.

2.

3.

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

☐ 1. no numerical growth

☐ 2. 5 percent annual increase in membership

☐ 3. 10 percent annual increase in membership

☐ 4. 15 percent annual increase in membership

☐ 5. greater than 15% annual increase in membership

3. What are the three greatest strengths of UUFM? Please use no more than 5 words for each.

1.

2.

3.

4. What are the three most important challenges UUFM needs to address in the next five years? Please use no more than 5 words for each.

1.

2.

3.

[illegible][illegible]

UNITARIAN  
UNIVERSALIST  
ASSOCIATION



## Appendix D: Searching for the Future

### **Overview**

**Searching for the Future** (SFTF) is a weekend program of small group workshops designed to help a congregation clarify its vision and mission, and develop an initial set of goals and priorities that can later be incorporated into a strategic plan. The workshops are participatory and lively, making the process of clarifying vision and mission not only painless, but actually fun. The process is tailored to the specific needs and starting point of each congregation, and often focuses on the physical and financial resources needed to support mission and vision. Thus it can be very helpful for framing requirements for major facility improvements that can be supported by a building program and capital campaign.

The magic of the process is that it takes place in one intensive weekend, in which as many congregants as possible participate in workshops facilitated by trained congregants. The energy and enthusiasm create a palpable “buzz” and help build momentum for future steps. The process includes a “train the trainer” component in which the Stewardship for Us (S4Us) consultant facilitates a session on Friday evening for congregants who then facilitate sessions on Saturday – with the guidance of the S4Us consultant or UUA Regional Staff. This provides many benefits such as leadership development, congregation ownership, leveraging of resources, and enabling large numbers of congregants to participate all in one weekend.

### **Benefits**

- Develops a common vision to serve as a focal point for strategic, financial, and building plans
- Creates momentum through the intensive weekend process
- Engages large numbers of congregants, promoting buy-in for major projects to follow
- Provides opportunities to identify and inspire emerging leaders

### **What We Offer**

S4Us consultants and Regional Staff will work with UUFM leaders in advance to customize the process to ensure it reflects work that has already been done and desired outcomes. For example, if your congregation has recently developed an inspiring and effective mission statement, the SFTF process would be tailored to build on it rather than seeking to create a new one. And if a building program is a key desired outcome, the discussion of goals and priorities would focus on physical plant needs, while still ensuring a comprehensive look at how best to support mission and vision. Other preparatory work is helping recruit congregation members who will serve as facilitators.

During the weekend, the S4Us consultant facilitates the Friday evening session for the volunteer facilitators. This session has two purposes: it allows the facilitators to be participants and contribute their input; and it trains them to be facilitators for the rest of the congregation. Facilitators need not be congregation leaders, thus affording an opportunity to recruit newer members and develop new leaders. Regional staff will kick off the Saturday program and then monitor the small groups to ensure they stay on schedule and on task. The consultant then convenes a final wrap-up session either Saturday evening or Sunday to consolidate and synthesize the results from all of the small groups and create a consensus package for presentation to the congregation.

Many congregations post the work products and synthesized results for a week or two and invite people who were unable to attend to add their comments. This can broaden support for the process and outcome. Your S4Us consultant will help you pursue a process that maximizes engagement while

respecting the time and commitment of the weekend attendees and the need to move rapidly and sustain momentum and excitement.

## Appendix E: Strategic Financial/Resource Plan Template

<b>Cash Flow: Revenue</b>	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)								
<b>Total Revenue</b>								
<b>Cash Flow: Expenses</b>								
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)								
<b>Total Expenses</b>								
<b>NET INCOME/LOSS</b>								
<b>Basic Contextual Data</b>								
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)								
Other key parameters (e.g., parking spaces)								

Note: Rows can be tailored to include all items of relevance to each congregation.