

Next Steps Weekend Report: EXECUTIVE SUMMARY

To see the full report, contact a member of our Executive Team: Call 920-731-0849 or e-mail Rev. Christina (Christina@fvuuf.org), Rev. Leah (Leah@fvuuf.org), or Phyllis Schmitt (Phyllis@fvuuf.org)

Mark Ewert is a stewardship consultant with the organization Stewardship For Us. He is a longtime UU with All Souls UU Church in Washington, DC and has worked with many UU congregations of varying sizes all over the country.

The Governing Board hired Mark to the Fellowship to assess and give feedback to us on three things: 1) Our stewardship processes and how we can improve, 2) The organization and reporting structure of our stewardship and planned giving committee to different groups (the executive team, and the board respectively), and 3) Further development of our endowment/ planned giving committee, including the purpose of the endowment, structures, etc.

Mark notes in his report many strengths of the Fellowship, including our membership, leadership, staff, building, and programs.

He also notes challenges related to the purpose of his visit:

- We grew very quickly (by congregational standards) and creating strong structures was not able to be prioritized in the midst of growing and adapting to the changes of growth.
- We struggle with the annual pledge drive and fulfilling our budget.
- Understanding ourselves as a congregation that engages issues of stewardship, is fairly new.
- The endowment has only recently grown large enough to be of use as a financial tool to the Fellowship, and as such, emphasis has been on its growth rather than its purpose or processes for how to utilize it should we decide to do so.

He notes that there are 3 primary purposes of stewardship in the life of a healthy congregation (from a “best-practices” viewpoint):

- The individual spiritual growth of your members through practicing the just use of money (including charitable uses)
- Building a beloved community of economic diversity, which creates right relationship in regards to congregational fellowship and resources
- Fulfilling your mission and purpose

He states: “With these goals in mind, education and discernment are required for individual members of all ages, and for the congregation as a community and as an organization.”

Regarding the endowment, Mark notes that further cultivation of legacy gifts to the endowment is needed, as well as celebration or to honor memorials or our Fellowship’s founders and sustainers. Ideas such as a memorial garden and/or usage of the Legacy Room for these purposes were noted.

Mark notes challenges in our annual financial commitments (pledging) and annual giving, such as high numbers of households that pledge very small amounts while there are a few households that pledge a lot. He notes that it’s natural to have a wide range of pledges, but that our distribution can create risk—one high-pledging family that leaves places a financial burden on the whole Fellowship which would be easier to absorb if we had a more even distribution of pledge amounts.

He connects membership/ belonging with stewardship as well, as stewards are caretakers of the institution, and often people who feel deeply connected are better stewards, regardless of the size of their pledge.

Mark notes that a capital campaign is a needed possibility, particularly to enlarge and improve our religious education wing. However, he cautions that we should focus on improving and strengthening stewardship and planned giving efforts before taking on the challenge of a large capital campaign.

Mark's recommendations are:

- **Create a vivid picture of the congregation's "ideal future state," (eg, vision statement).** Having a strong vision will allow us as a Fellowship to create a strategic plan that includes staffing, building needs, etc.

- **Gather all financial stewardship under one committee umbrella.** Currently our generosity ministry team (stewardship) is a committee that reports to the executive team (staff), while planned giving is a committee of the board. They are separate from each other and have different reporting structures. Mark recommends that we combine the two and their efforts since they're both stewardship, differing only in that one asks for short-term gifts while the other asks for long-term ones. Mark recommends that, as a large congregation using policy governance, it would make sense for this committee to report to the executive team, with ongoing board involvement. If the board chooses to move forward with this recommendation, the congregation would have to vote for a change in our Fellowship's by-laws, something that has not yet been decided. If, or when, anything is needed for moving forward, the congregation will be informed and invited to engage.

- **Continue to develop an active financial stewardship program.** He recommends we continue experimenting with our stewardship program, methods, and materials, that we engage children in RE in stewardship (understanding themselves as stewards or caretakers of the Fellowship), and that the generosity ministry team does more work to develop our programs, policies, and practices.

- **Clarify the endowment purpose and develop more long-term stewardship elements.** Now that our endowment has reached the size where it can be useful financially to the Fellowship, we need to clarify what the endowment is for. This will allow people to want to give generously to it, include it in their will, etc., because they feel connected to the purpose of the will. Mark also gives other recommendations for honoring congregational history, ancestors/founders, previous donors to the endowment, memorialized loved ones, etc., as a way to connect people in a long-term way to this Fellowship.

Mark ends his report with three options for future work that the Fellowship board could choose to do with help from his consulting firm, Stewardship for Us. This weekend was intended as the first step and help us discern next steps, hence the name of the weekend, Next Steps Weekend. The Board has not yet determined if, or how, they will choose to continue to engage Mark and Stewardship for Us. The congregation will be informed if we work with them again.