



Next Steps Weekend

November 15-17, 2019



Stewardship FOR US
Building Cultures of Generosity and Commitment



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Stewardship Consultant

My Background

Rachel
Maxwell



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

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

What is a Next Steps Weekend?



Review of the Weekend

Friday

- Meetings with Minister and Board

Saturday

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

Sunday

- Presentation to congregation after service

(Written report to follow within two weeks)



Who you are

Mission:

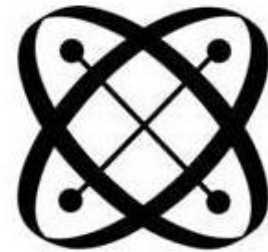
Bound by courageous love,
growing in spirit,
and inspiring compassionate action.

Vision:

Creating a just world through vibrant
beloved community.

Values:

Inspiration, compassion, and connection



What do you
want to do?

Get your financial ducks in a row so you can staff adequately and live your mission.

You don't want money worries to get in the way of *creating a just world through vibrant beloved community!*



Eliot Chapel by the numbers: 2018-19 as reported to UUA

- 543 members
- 350 pledging households
- 294 average Sunday worship attendance
- 205 RE enrollment
- **\$685,321 pledging income 2018-19**
- Average pledge = \$1,958
- Median pledge = \$1,200
- Annual Expenditures = \$612,000



Eliot Chapel by the numbers:

Comparisons with other congregations your size for 2019 year.

- Of the 15 congregations in the UUA with between 490 and 590 members:
- You have the 5th largest average pledge.
- You have the 2nd largest RE program.
- You are 6th in average Sunday attendance.
- You are 4th in pledging income.
- You are 10th in total expenditures.



Eliot Chapel by the numbers:

Comparisons with other Missouri congregations for 2019 year:

- Of the 8 UU congregations in Missouri:
- You have the largest number of members by more than 100.
- You have the largest RE enrollment and Sunday attendance.
- You have the 2nd largest average pledge – the third is First Unitarian -- pennies below you.



Eliot Chapel by the numbers:

Comparisons with other MidAmerica Region congregations for 2019 year:

- Of the 183 UU congregations in the MidAmerica Region:
- You are the 9th largest.
- You are 7th in RE enrollment and average Sunday attendance.
- You are 14th in total expenditures.
- You are 40th in average pledge size.



Eliot Chapel by the numbers: 2019-20

- 500 members
- 287 pledging households
- **\$638,619 pledges**
- Average pledge = \$2,225
- Median pledge = \$1,200
- Annual budget ~\$860,000



Eliot Chapel by the numbers: 2015-2019

FISCAL YEAR	PLEDGING HOUSEHOLDS	AMOUNT PLEDGED	AVERAGE PLEDGE
2019/2020	287	\$638,619	\$2,225
2018/2019	326	\$696,898	\$2,138
2017/2018	337	\$624,470	\$1,853
2016/2017	316	\$568,000	\$1,797
2015/2016	283	\$528,000	\$1,865

Eliot Chapel Pledge Distribution – 2019/20

Each 25% = ~ \$160,000	# of St Johns Households	Annual Pledge Range	% of Households
First 25%	13	\$7,500 to \$24,000	4.5%
Second 25%	31	\$7,000 to \$4,300	10.8%
Third 25%	52	\$2,100 to \$4,200	18.1%
Fourth 25%	191	\$20 to 2,000	66.6%

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



Eliot Chapel has Assets:

- Church property (\$86,000 mortgage remains – fully repaid Mar 2023)
- Bergfried – 500 acres
- 222 Argonne property (\$392,000 mortgage – balloons Dec 2023)
- Endowment = \$107,000
- Other restricted funds = \$191,000

Our Collective
Contributions
are the Life
Blood of our
Congregations

- We give because we are committed to our congregation's mission, UU principles and values.
- We give because we are connected to the community
- We give through our involvement in the congregation's programs

Blessings



- Historic beautiful church and sanctuary.
- A thriving RE program, youth group and young adult group.
- 18 covenant groups.
- An active racial and environmental justice ministry.
- Deep and committed leadership.
- Adults who grew up in this church.
- Congregation eager to be more connected.
- An urban campus with room to expand.
- A 500 acre wooded sanctuary.

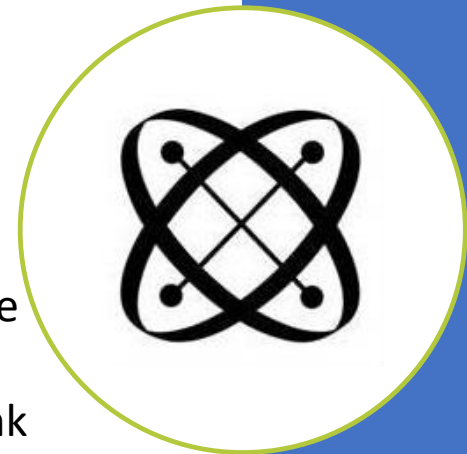
Challenges



- Uncertainty about your now part-time loved senior minister.
- High anxiety about finances.
- Deficit budgeting as a culture.
- Sense of disconnect from leadership and organizational process.
- Deficit budgeting as the norm.
- Anxiety about staff departures.
- Deferred maintenance issues in parts of your building.
- Lack of clarity about how to engage with your challenges.

What do you love most about Eliot Chapel?

- Our mission to put our faith in action
- Thoughtful passionate people
- Belonging to a community
- Eliot stimulates me to be a better person
- Many different opportunities to participate
- Kind and caring individuals with shared values
- Willingness to work on difficult social issues
- The feeling that it is my extended family supporting me
- Inclusive intentionally welcoming community
- The chance to sing beautiful music that makes me think about the big questions
- Barbara's courage and dedication
- Feeling of belonging
- The acceptance of differences
- Being able to be myself



Work to Do / Next Steps

- Create a long term strategic financial plan. Include upcoming capital needs.
- Review what's working and what's not about your budgeting and governing processes and make adjustments as necessary.
- Share organizational information. Give updates on finances and property.
- Change your institutional money story from one of fear and scarcity to a story of Eliot's gifts.
- Share your personal money stories with each other.
- Engage with Rev. Helen in your stewardship activities.
- Take good care of yourselves and each other as you travel through this time of transition.





An Eliot Chapel money story

- Eliot Chapel is a place that inspires us to do good in the world, giving of our resources of time, talent, and treasure in service to the larger community.
- People at Eliot are accepting of one another. They care for each other and this place.
- Our RE program is full and the youth group is marvelous. We serve all generations.
- We have a beautiful facility in downtown Kirkwood and a 500 acre retreat available to all.
- And.. despite having to ask for pledges & increases more than once-- due to the generosity of this congregation as well as the efforts of staff in reducing costs-- Eliot had a surplus at the end of the last fiscal year.
- We have the resources to do all we want!



Readiness Indicators for Capital Campaigns

1. Compelling shared vision and plan for use of funds
2. Awareness of need and sense of urgency
3. Engaged congregation with little internal conflict
4. Healthy Stewardship and annual funding strong

Ask “What is possible?” not “What’s wrong?” Keep asking.

Notice what you care about.

Assume that many others share your dreams.

Treasure curiosity more than certainty.

Invite in everybody who cares to work on what’s possible.

Acknowledge that everyone is an expert about something.

Know that creative solutions come from new connections.

Remember, you don’t fear people whose story you know.

Real listening always brings people closer together.

Trust that meaningful conversations can change your world.

Rely on human goodness. Stay together.

--Margaret Wheatley



Thank
you for
all you
are and
do!

Inspiration
Compassion
Connection

Creating a
just world
through
vibrant
beloved
community.



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