

# **Next Steps Weekend**

## **Unitarian Universalist Church of Delaware County**

Prepared by

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## INTRODUCTION AND SUMMARY

This report presents the results of a Next Steps Weekend (NSW) with the Unitarian Universalist Church of Delaware County (UUCDC). The visit was conducted by Barry Finkelstein, a Unitarian Universalist (UU) Congregational Stewardship Consultant with *Stewardship for Us*. This report is based on an intensive weekend on site, October 12-14, 2018, along with pre- and post-visit analysis.

### *Goals for Stewardship Consulting*

The primary goals of UUCDC in engaging a stewardship consultant were to:

- Evaluate UUCDC's readiness for a capital campaign
- Develop and conduct a robust plan for a capital campaign, tailored to our church

### *Highlights of Results and Recommendations*

The major result of the NSW process is that UUCDC is ready to move forward with a facility expansion and renovation program and capital campaign. The capital campaign "balance sheet" included in the report shows that positives far outweigh challenges, and a successful building project and capital campaign will go a long way toward addressing the small number of challenges. Key positives include overall congregational health and a strong sense of community; committed and capable leadership and campaign teams already in place; strong staff and much-beloved minister who are all committed to the project; and your current property and facilities.

The following recommendations will position UUCDC for a successful capital campaign and will also strengthen the Church's financial stewardship:

- ***Communicate, Educate, and Engage:*** Continue the conversation begun during the Weekend, share your dreams and passions with one another, talk about the financial commitments it will take to make these dreams a reality, and develop and carry out a comprehensive communication plan.
- ***Develop a Conceptual Design the Project:*** Develop three different options for the building project, including solid cost estimates. Engage the congregation in exploring the possibilities in terms of your mission and growth and outreach plans.
- ***Develop a Financial and Resource Plan:*** Develop a long-range (five year) resource and financial plan to communicate clearly what is possible and the expectations regarding annual and capital financial commitments. Explore multiple scenarios and assumptions linked to the different building project options. Link this plan to the capital project and to a revised strategic plan.
- ***Plan for and Conduct an Excellent Annual Campaign:*** Employ best practices to conduct a successful campaign in the Winter and Spring of 2019, targeting a subset of the congregation for one-on-one stewardship conversations, developing skills for an upcoming capital campaign.
- ***Plan for and Conduct a Successful Capital Campaign:*** Building on the success of the 2019 annual campaign, conduct a capital campaign in the Fall of 2019. Include a Financial Feasibility Study, a comprehensive communication and engagement plan, involve many people, and create and sustain momentum and enthusiasm.

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	UU Church of Delaware County 145 W Rose Tree Rd Media, PA 19063
Website Address	www.uucdc.org
Dates of Visit	October 12-14, 2018
Minister/Program Staff	Rev. Peter Friedrichs, Senior Minister Chrissy Bushyager, RE Director Bob Rowland, Music Director Rina Jurceka, Church Administrator
Points of Contact	Jean Wallace, Co-Chair, Steering Committee Jennifer Oglesbee, Co-Chair, Steering Committee
Key Leaders	Joe Miller, President Bill Clinton, Co-Campaign/Stewardship Chair Lori Rice-Spring, Co-Campaign/Stewardship Chair
Number of Members	270 (UUA Certification 01/30/18)
Fiscal Year	July 1 to June 30
Annual Operating Expense Budget	\$492,000 (FY 2018-19 Budget)
Annual Financial Commitments Based on FY 2018-19	\$385,000 = 78% of operating expenses (194 household donors)
Average Financial Commitment (2018-19)	Mean: \$1,985 Median: \$1,000 80 <sup>th</sup> Percentile: \$2,508
Trust or Endowment (Permanent Funds)	\$129,000
Other Assets (Operating Reserves)	\$105,000 (approx. 2.5 months of operating cash on hand)
Current Debt	\$328,000 mortgage balance (9/30/18), interest rate 4.25%, maturity March 2030
Approach to Annual Budget Drive	Commitment Sunday and direct mail with telephone follow-up
Most Recent Capital Campaign	1998-99, raised \$300K, which was the goal, to build the current sanctuary
Other Items	Honor Congregation: Full Fair Share with the UUA and District/Region Fair compensation, Welcoming Congregation, Green Sanctuary IT systems: Breeze, QuickBooks, Vanco, Excel

### *Advance Contacts and Preparation*

In advance of the weekend visit, Barry had several email exchanges and telephone and video calls with Rev. Peter Friedrichs and several church leaders, and attended one meeting in person. He spoke with Pat Infante of the UUA Central East Region. He reviewed extensive materials provided by UUCDC, including information on finances, stewardship and pledges, recent strategic plan, the Facility Improvement Team (FIT) report, and overall information on Church history, ministries, by-laws, and programs. He reviewed materials in recent annual reports and on the Church website.

### *Visit Schedule and Process*

The schedule for the weekend visit is presented as Appendix A, which identifies the various groups and constituencies who participated. During the Friday and Saturday sessions, Barry toured the facility and met with approximately 52 people. The tour included a discussion and walk-around to illustrate the current thinking around building expansion and renovation. Barry led a stewardship workshop on Saturday afternoon attended by approximately 25 people, delivered a reflection during the Sunday morning worship service (outline provided as Appendix B), and summarized his findings and answered questions at open forums following both services.

### *Accomplishments to Date*

UUCDC has already accomplished much toward a facility expansion program, including:

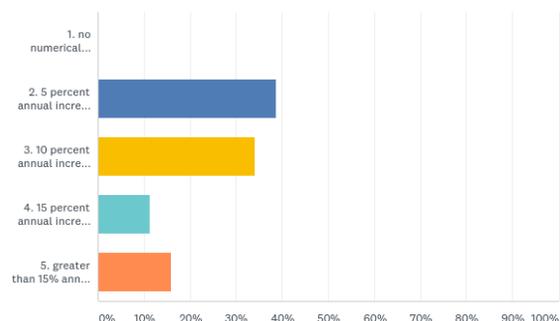
- Decision to stay in current location
- FIT process and report, providing a head-start on building plans and identifying priorities such as additional RE classrooms, meeting space, a large fellowship space, kitchen, offices, parking, and improvements in accessibility and space for the Rose Tree Day School
- Created and staffed core leadership teams, including a steering committee, campaign/stewardship team, and building team
- Began architect search with an effective Request for Qualifications (RFQ) process, narrowed the search to three finalists, and preparing a formal Request for Proposals (RFP).

## DATA AND ANALYSIS

### *Survey Results*

Forty-five 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 UUCDC, list the Church's strengths and challenges, and indicate a preference for growth. The form is shown in Appendix C and the results are below and in Appendix D.

All 44 people who responded to the question on membership growth would like to see the congregation grow, which is not always the case, and is a positive factor for a capital campaign. The graph 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:"



Highlights reflecting the most frequent responses to the three open-ended questions are presented in the following paragraphs and word clouds in Appendix D. The survey results are generally consistent with my observations during my visit and reflect a healthy congregation with much to be proud of and energized about. There were no red flags among the milestones or challenges.

- **Question 1: The most frequently cited Milestones:** building the sanctuary (24); calling Rev. Peter (23); becoming a Welcoming Congregation and related support for LGBTQ persons (10); other building-related work on the fellowship hall and other spaces (9); social justice initiatives such as housing the homeless, civil rights, occupy (6); Religious Education (RE)-related initiatives, such as hiring Chrissy, creating a salaried DRE position, integrating RE and adult programming (6); earlier ministries, notably Judith Downing, Dave Kibby (5); policy governance (5); and several other milestones mentioned by one or two people: Rose Tree Day School, Breakthrough Congregation, surviving a failed ministry, periods of rapid growth.
- **Question 3: The most frequently cited Strengths:** Rev. Peter (20); RE and youth programming (14); strong sense of community (11); high quality Sunday services with music, sermons, presence of kids noted (9); welcoming (9); recent growth particularly among young families (8); dedicated, committed members (8); lay and professional leadership (7); commitment to social justice and activism (6); action-oriented, can-do attitude, innovative, willing to take risks (5); healthy congregation, no factions, trust leaders, civility (4); facilities and location (4); and several other strengths mentioned by one or two people: relevance, compassion, generosity, open-minded, honesty, opportunities to get involved, Rose Tree Day School, belonging.
- **Question 4: The most frequently cited Challenges:** Facility improvements and expansion to meet the needs of current operations and growth especially for RE (21); Increasing diversity, addressing anti-racism, inclusivity, white supremacy (17); stewardship, finances, and related items concerning money and financial resources for operations and needed capital investment (15); deepening connections, strengthening and sustaining community, engagement, intimacy (14); increasing outreach and involvement in the community, being more known and visible, social justice (14); encouraging and accommodating growth, integrating new people while improving retention (12); succession planning for Rev. Peter's retirement and staff planning generally (8); air conditioning in the sanctuary and elsewhere (6); prioritizing – achieving balance while focusing, managing change (5); avoiding burnout, increasing volunteerism and energy (5); kitchen (4); and several other challenges mentioned by one or two people: communications, programming to attract young people, parking, bathrooms.

### *What is Special at UUCDC*

The open workshop on Saturday, August 19, attended by approximately 25 people, demonstrated passion and commitment to the Church and its mission. I was impressed that several newer members attended, including one who had been coming to UUCDC for only a few weeks. Each participant was asked to pair up and share a story about a powerful moment at UUCDC -- a time when something memorable and moving happened for them personally. They were then asked to talk about what is special at UUCDC that enabled those moments to occur. Everyone was able to have a spirited personal conversation with their partner, and people shared moving stories that reflect the importance of the Church in peoples' lives.

The special items noted are:

- Spirit
- Like-minded people
- Rev Peter’s sermons
- Deliberative process
- Welcoming of visitors
- Shared community
- Sacred space
- Engagement of children and families
- Support
- Opportunities to be involved
- Connections
- History
- Mayhem in May

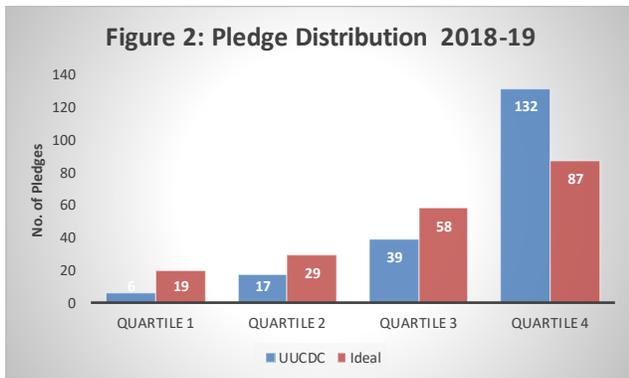
### *Feelings About Money*

Also during the Saturday afternoon workshop, participants were invited to share their immediate reactions to the word “money” and discuss their feelings briefly. The responses, shown in Figure 1, indicate a mixed view of money – about an equal number of positive, negative, and neutral responses. Recognizing the baggage that people carry about money and providing opportunities to talk through their discomfort and anxiety will be useful as you engage with one another about the money aspects of the facility project and capital campaign.

**Figure 1: Brainstorming Results about Money**

<b>Positive</b>	<b>Negative/Concerns/Challenges</b>	<b>Neutral/Ambiguous</b>
<ul style="list-style-type: none"> <li>• Give till it feels good</li> <li>• Good pension</li> <li>• It all adds up</li> <li>• Gratitude for having it</li> <li>• Use to buy stuff</li> <li>• Fortunate</li> <li>• Opportunity (2)</li> <li>• Magic</li> <li>• Power</li> </ul>	<ul style="list-style-type: none"> <li>• Anxiety</li> <li>• Frustration</li> <li>• None of your business</li> <li>• Insufficiency</li> <li>• Never enough</li> <li>• Tension</li> </ul>	<ul style="list-style-type: none"> <li>• Sacrifice</li> <li>• College (2)</li> <li>• Tool</li> <li>• Juggling</li> <li>• Allocation</li> <li>• Is it enough (2)</li> <li>• Fixed income</li> <li>• Family responsibilities</li> <li>• Deep thinking (2)</li> <li>• Organization and people</li> </ul>

### *Analysis of Annual Financial Commitments (Pledges)*



The distribution of UUCDC’s annual financial commitments is presented in Figure 2, along with a comparison to an ideal distribution. As shown, the UUCDC distribution is highly skewed. Six families representing 3% of the pledging households account for 25% of the total dollars pledged, and 17 households or 9% account for the next 25%. Thus, half the total dollars are provided by 12% of the households, and the top giver provides nearly 10% of the total. We would ideally like to see 10%

of the households in the first quartile and 15% in the second, which would create a more equitable distribution and would reduce risk from dependence on a few large contributors.

At the other end of the distribution, the fourth quartile includes 68% of the households. Fifty-eight households, 30% of the total, contribute \$500 or less; this is up from 2017-18 when 47 households (25%) contributed \$500 or less. Table 1 provides additional pledge data for FY 2018-19, along with a comparison of key metrics from 2017-18. It should be possible to encourage more equitable giving through education, communication, inspiration, and a more energetic and focused annual stewardship campaign.

A final note concerns new members pledging. A quick analysis indicates that newer members pledge considerably less than established members and, while this is not unusual, the difference is large enough that it is worth considering how new members are invited to support the Church financially. The 2017-18 Annual report presented on May 20, 2018 identifies 21 new or reinstated members (19 households). Of these, 14 made pledges for 2018-19. Their mean pledge is \$807 and their median is \$380, compared to \$1,976 and \$1,000 for the entire congregation. The pledge figures for new members would be lower if the 5 who did not pledge at all are included.

**Table 1: UUCDC Pledge Data FY 2018-19**

	UUCDC	Ideal	UUCDC	Ideal	High Pledge	Mean Pledge	Median Pledge	Low Pledge	80th Percentile	TOTAL
QUARTILE 1	6	19	3%	10%	\$35,000	\$16,783	\$14,250	\$9,000		\$100,700
QUARTILE 2	17	29	9%	15%	\$8,500	\$5,761	\$5,250	\$4,000		\$97,930
QUARTILE 3	39	58	20%	30%	\$4,000	\$2,460	\$2,400	\$1,500		\$95,924
QUARTILE 4	132	87	68%	45%	\$1,500	\$686	\$600	\$100		\$90,555
No. \$10K and up	4		2%							
No. \$5K to \$10K	12		6%							
No. \$2K to \$5K	36		19%							
No. \$500 and under	58		30%							
<b>TOTALS 2018-19</b>					<b>\$35,000</b>	<b>\$1,985</b>	<b>\$1,000</b>	<b>\$100</b>	<b>\$2,508</b>	<b>\$385,109</b>
<b>PRIOR YEAR 2017-18</b>					<b>\$33,000</b>	<b>\$2,004</b>	<b>\$1,200</b>	<b>\$50</b>	<b>\$2,400</b>	<b>\$374,690</b>
<b>CHANGE FROM PRIOR YEAR</b>					<b>\$2,000</b>	<b>(\$19)</b>	<b>(\$200)</b>	<b>\$50</b>	<b>\$108</b>	<b>\$10,419</b>

## FINDINGS AND RECOMMENDATIONS

### *Capital Campaign Readiness Assessment*

Figure 3 is a “balance sheet” showing positives and challenges for UUCDC in terms of readiness for a capital campaign. The balance sheet reflects the factors that indicate likelihood of success. These include how compelling is the project and how much advance work has been done; financial stability and resources including annual giving, balanced budgets, and advance funds available for the project; overall congregational health and mood; capacity and priority of leadership to focus on and execute the project effectively; how engaged has the congregation been in planning for the project so far; and the timing of the project in the life of the congregation.

**Figure 2: Capital Campaign Balance Sheet**

<p><b>Positives:</b></p> <ul style="list-style-type: none"> <li>• Decision to remain at your current location</li> <li>• Strong, healthy congregation</li> <li>• Much beloved minister who is a strong supporter of the campaign</li> <li>• Project linked explicitly to mission – growth in RE, kitchen to support programming, larger fellowship space, upgrades, accessibility</li> <li>• Wonderful physical assets – the existing building, your beautiful property, your location</li> <li>• Well organized and staffed teams for the building project and capital campaign; strong, committed leaders of those teams</li> <li>• Uniformly positive energy and enthusiasm from everyone I met with over the weekend</li> <li>• Solid finances, as evidenced by balanced budgets, cash reserves, and an endowment now large enough to provide grants in service of your mission</li> <li>• Strong support by the staff and lay leaders on the Board and ET and other teams, and willingness to participate</li> <li>• Effective implementation of policy governance following a deliberative process and some post-implementation tweaks.</li> <li>• History of getting things done and innovating: financing and building the current sanctuary, building out the downstairs space, while Rev. Peter was on sabbatical</li> <li>• Your innovative Growth Through Service program which supports connection, leadership development and learning, which will help you cultivate strong leaders and engaged congregants</li> <li>• History of strategic planning including a current process to create a new plan, indicating a focus on the future</li> <li>• Much going on – I learned of so many programs involving people of all ages and varying interests; should support growth and engagement</li> <li>• Very positive survey and workshop results during my weekend with you, including the many characteristics that make UUCDC special, and no red flags</li> </ul>	<p><b>Challenges:</b></p> <ul style="list-style-type: none"> <li>• Lack of stewardship infrastructure – it’s been a long time since you did a spirited annual campaign with clear giving guidelines and a direct personal ask during one-on-one stewardship visits, all of which will be required for a successful capital campaign</li> <li>• Some discomfort and anxiety talking about money</li> <li>• Something to be aware of: there is much going on at UUCDC, as noted on the positive side of the ledger, possibly creating a challenge to focus energy and priority on the capital campaign</li> </ul>
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The balance sheet indicates that the positives far outweigh the challenges, and UUCDC is well-positioned to pursue the next steps toward a capital campaign. As indicated in the recommendations which follow below, the pursuit of an excellent capital campaign, preceded by a more spirited annual campaign this coming winter/spring, will help address the stewardship challenges and strengthen the Church for the long haul.

*Recommendations*

My recommendation is that UUCDC plan to conduct a capital campaign in the Fall of 2019 to support the proposed building expansion and renovation. The proposed timing will allow you to strengthen your annual giving and stewardship infrastructure, flesh out the project plan and engage the congregation about the project and about what will be required to conduct a successful capital campaign. Consult Beyond Fundraising, by Wayne Clark, especially Chapters 10 and 12, as a guide to pursuing the capital

campaign and Chapters 5 and 6 for information about the annual campaign. Specific recommendations are presented below. Appendix E provides suggestions about organizing for the campaign and roles and responsibilities, which will help you build on the teams you already have in place. Appendix F is a high level timeline.

### 1. ***Communicate, Educate and Engage***

As you continue to engage the congregation about the building needs and plans, it is now time to begin talking about the money side of the project. The work done during the NSW is a good beginning, as it provided an opportunity for UUCDC leaders and congregants to meet with a campaign consultant and learn what it will take to be successful. The Weekend also generated excitement and enthusiasm, and provided opportunities for people to share deeply personal stories about their experiences at UUCDC. Sharing such stories deepens connections to one another and to the congregation, leading 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.

As you plan for the coming annual campaign and next year's capital campaign, establish a communication team and a detailed plan. You have a good start on this with a dedicated communication team leader in place.

And there's nothing more effective than talking with one another during coffee hour and other informal settings, sharing what's special about the Church and how it has transformed your lives. Share your dreams for the future of UUCDC and its mission and ministries, and talk about the money it will take to get there and how we can create a culture of joyful giving. Becoming comfortable talking with one another about money in church will enable you to conduct a campaign based on one-on-one personal conversations, which is essential. The exercise conducted during the Saturday afternoon workshop demonstrated that you are fully capable of having these conversations and that these conversations will be enriching and enjoyable.

### 2. ***Develop conceptual design plans for the project***

Continue the work underway by the Building Team. Complete the process of selecting an architect who can work with you effectively. You have done an excellent job soliciting the initial qualification statements, helping firms determine if they were a potential good fit. Some considerations as you continue the selection process:

- Assess experience and talent for helping you engage the congregation in innovative and effective ways including use of technology and presentation skills
- Explore how the architect estimates construction and total project costs and how accurate past estimates have proven; check with references on this
- Visit some recent projects to see their finished work and to talk with clients about working with the firm

Once you have selected the architect, work with him/her to develop concept plans for three options at three likely feasible price points, and engage the congregation in exploring and comparing the options. In setting the range of feasible price points, recognize that most congregations can raise between three and four and a half times annual giving; for UUCDC this would mean capital campaign funds between \$1M and \$1.6M. These numbers will be refined as

better information is available about project components, costs, opportunities, and the congregation's receptivity; defining the project and determining your capacity is very much a "chicken and egg" process.

In developing the plans for the project, your primary focus should be on how well it supports UUCDC's mission and vision. Obtain reasonably accurate (and conservative) cost estimates for each option, including any impact on ongoing operating costs. Conduct an informal congregational vote to choose a preferred option for the next step in the process. The preferred option will be the basis for the financial feasibility study, which is a key step in determining UUCDC's capacity.

3. ***Develop a long-range financial plan to support the project and future vision for UUCDC***

Identify the resources needed to support your long range vision over the next five years. Align with the new strategic plan the Board is developing. Document all assumptions about annual budgets and required pledging to support your goals and objectives. Appendix G is a template you can use to get this started, tailoring it as needed. Include any one-time and ongoing costs related to the building project. Address how your current mortgage will factor into the long-range plans: will it be paid off as part of this campaign, rolled into a new mortgage? Consider any potential changes in staffing needed to support anticipated growth and mission and program needs. Explore multiple scenarios.

Include planned giving and endowment expansion as part of the planning, and carry out steps to encourage legacy giving.

Consider the following as part of your financial planning:

- Eliminate the fee for children's religious education – such a fee is anti-growth and serves to set the RE program apart from the adult programs, while raising very little money (and may be counterproductive as parents think the fee is all they need to give). It is much better to inspire families to pledge at levels commensurate with their values, financial capacity, and engagement in the program.
- Eliminate the minimum pledge amount – it is fine to have a required pledge or contribution of record as a condition of membership, but a minimum sets a low bar. Instead, encourage all members and pledging friends to pledge generously at levels that make them proud.
- Adopt and commit to a giving guide – I recommend formal adoption of a guide that reflects UUCDC's values (for example, one that is progressive to promote equity in giving) and that leadership can commit to. The guide is intended to help members and pledging friends, including new members, think about their financial commitments. Consider the UUA's guide which is progressive and simple in concept as it is based solely on level of commitment and financial capacity. Whatever guide is adopted should be embraced by the leadership as it is unreasonable to ask people to do what the leaders are unwilling to do.

Present the financial plan, largely at a summary level, to the congregation in various ways and discuss assumptions and implications for annual pledging and capital campaign contributions;

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 Church. 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 Church community.

4. ***Plan and conduct an excellent annual campaign this coming winter and spring***

Use the Winter/Spring 2019 annual campaign to develop a stewardship infrastructure based primarily on one-on-one stewardship conversations led by trained visiting stewards and following the best practices presented in Beyond Fundraising. The intent is twofold: one is to encourage maximum generosity to lay a solid financial foundation for the capital campaign; and two is to help people get comfortable engaging with one another in deep, personal conversations about their connection to UUCDC and their financial commitments to support the mission and vision of the Church they love so much.

Key elements of the campaign should be: strong support by the Board and staff, a solid case for generosity including a mission-based budget, a giving guide that reflects UUCDC's values and encourages generous giving, special events for leadership givers and the entire congregation, and as many one-on-one stewardship visits as possible, conducted by trained visiting stewards. Conduct a formal campaign kick-off and conduct the campaign rapidly to sustain energy and enthusiasm. Track and report progress, and be sure to support the visiting stewards along the way. The leadership team and visiting stewards should be prepared to continue to run the capital campaign, capitalizing on their learnings during the annual drive.

Remind everyone about why we are conducting one-on-one stewardship conversations and of the expectation that everyone will participate. Note that the conversations are an opportunity to discuss the building project, ask questions, and consider how it will support UUCDC's mission. I recommend that you invite the congregation and the stewards to formally covenant during the kickoff Sunday service to participate enthusiastically.

5. ***Plan and carry out a successful capital campaign in Fall 2019***

Build on the preceding steps to plan, organize, and carry out the capital campaign. Consider the following:

- a. Continue to build enthusiasm and momentum, and...hoopla! Take advantage of the new church year and use your in-gathering service in the Fall 2019 to remind people about the plans, offer tours, answer questions, focus on inspiration and information.
- b. Develop an event plan to include a leadership event to kick off the quiet phase for the potential major givers and a general campaign kick-off. Involve new people in event planning.
- c. Develop and carry out a comprehensive communication plan – two coordinated tracks – building and money. For the building, clarify scope and capacities, costs, options considered, how this plan meets our needs and responds to the input received from members. For the money, educate the congregation about capital campaigns, what will be needed to ensure success, and where they might find money to contribute. Be sure to emphasize the importance of 100% participation, noting ways that people of modest

means can make valuable contributions.

- d. Cultivate potential major donors with initial contacts beginning now – review the directory and identify people with the potential and inclination to make sizable gifts, including any who might make a lead gift of 10% or even 20% of the goal. Develop and carry out a strategy for each potential donor, noting who should visit with each one and what the key messages should be. Consider multiple meetings over time.
- e. Conduct a Financial Feasibility Study (FFS) in Spring 2019 to validate the level of understanding of and support for the building plan, and to estimate how much money might be raised.
- f. Obtain formal Congregational approval for the capital campaign.
- g. Set a campaign goal and develop strategies for approaching members, especially potential major givers. Determine a target ask for each family.
- h. Conduct the quiet phase to line up major gifts, that is, \$10,000 and up. Begin with a leadership event to thank the potential donors for their past support, share some new information with them about the project (perhaps a near-final draft of the brochure or video presentation), explain the campaign goals and how important their support will be, and summarize the process and schedule. Follow this up with one-on-one conversations within a week or two. Analyze results to ensure that the leadership gifts are lining up with expectations, make any adjustments to messaging or goals.
- i. Conduct the general phase of the campaign, reaching everyone not included in the quiet phase. Continue the hoopla with an inspiring kick-off event and announcement of how much money has been raised so far, along with an appeal to reach our goal and attain 100% participation. Conduct one-on-one, in-person conversations, ideally using the same visiting steward assignments as for the annual drive. Track and report progress and conclude with a big celebration.

#### PROPOSED STEWARDSHIP CONSULTING SUPPORT

Stewardship consulting for specific tasks 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.

Labor charges are based on an hourly rate of \$130, and are billed only for time spent; contracts will have a ceiling or not-to-exceed amount.

**Table 3: Recommended Consulting Support**

Support	Scope of Work	Estimated Level of Effort & Cost
Winter/Spring 2019 Annual Budget Drive	<ul style="list-style-type: none"> <li>• Support for campaign planning, organizing, recruiting, execution, and tracking</li> <li>• Visiting steward training onsite</li> <li>• Campaign evaluation to support capital campaign</li> </ul>	24-30 hours, \$3,000 to \$4,000
Financial Feasibility Study	<ul style="list-style-type: none"> <li>• Detailed assessment of readiness for the capital campaign, estimate of how much money can be raised, and detailed recommendations about messaging and other success factors</li> <li>• 32-36 one-on-one, in-person interviews with a sample of pledging households, supplemented with some survey data</li> <li>• Meet with capital campaign team while on-site and also conduct informal training for doing major donor asks</li> </ul>	64 to 72 hours plus expenses for one visit, \$8,500 to \$9,500
Capital Campaign Support	<ul style="list-style-type: none"> <li>• Support for campaign planning following the FFS</li> <li>• Regular phone/video conferences plus one on-site visit to train visiting stewards</li> <li>• Review of materials</li> <li>• Follow-up lessons learned to strengthen ongoing stewardship</li> </ul>	20-30 hours, \$2,600 to \$4,000

Optionally, I could provide additional support for strategic planning and/or strategic financial planning. If this is of interest, let's discuss what options might be beneficial in terms of scope, type of service, and estimated costs.

## CLOSING

I enjoyed my weekend with you very much. You have so many wonderful programs that support your members and the wider community; it was a great opportunity for me to learn about them and how they touch peoples' lives. Throughout the weekend, I found myself energized by the spirit and engagement of everyone I met. As noted, you are ready to undertake a successful capital campaign and you have the leadership team in place to do it well. The campaign will strengthen the bonds of community in addition to raising funds to invest in your facilities.

The schedule we discussed during the weekend and reflected in my recommendations will give you time to strengthen your annual campaign process and invite greater participation and generosity. It will also give you time to flesh out a building plan and financial plan which will inspire confidence among UUCDC members and friends. The timing is fortuitous as your plans coincide with development of a new strategic plan as well.

It has been a pleasure and an honor to be with you for the Next Steps Weekend, and I very much look forward to continuing to work with you.

Faithfully submitted,



Barry P Finkelstein

*Stewardship for Us*

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Delivered to:

Rev. Peter Friedrichs, Senior Minister

Joe Miller, President

Jean Wallace, Co-Chair, Steering Committee

Jennifer Oglesbee, Co-Chair, Steering Committee

Copy to:

Patricia Infante, UUA Central East Region

## Appendix A: Next Steps Weekend Schedule

UUCDC Church of Delaware County

October 12-14, 2018

<p><b>Friday, Oct 12</b> 5:30-6:00 PM 6:00-6:30 6:30-7:00 7:00-8:30</p>	<p>Meet with Rev Peter, Capital Campaign team: facility tour</p> <p>Half hour one-on-one meeting with Minister</p> <p>Group meeting with staff (Minister, Religious Educator, Administrator, Music Director, Admin Assistant, Sexton)</p> <p>Informal reception with Minister, Board, Executive Team, Capital Campaign Team, Stewardship, other congregational leaders</p>
<p><b>Saturday, Oct 13</b> 9:00 AM to 1:00 PM</p>	<p>Five small group meetings:</p> <ul style="list-style-type: none"> <li>• <b>9-9:55 am.</b> Recent past presidents</li> <li>• <b>10-10:55 am.</b> Stewardship, annual budget drive, treasurer, finance, endowment, planned giving, capital campaign communication</li> <li>• <b>11-11:45 am.</b> Facilities, including building &amp; grounds, building program planning, sexton</li> <li>• <b>11:50-12:30 pm.</b> Membership, leadership development, Growth Through Service (GTS), administration, social justice, RE</li> <li>• <b>12:35-1:15 pm.</b> Key programs for families, adults, youth, and children, including RE, Young Families, worship, social justice, outreach, denominational connection, music, caring, Dinosaurs Alive 65+</li> </ul>
<p>1:20 to 1:55 PM</p>	<p>Working lunch at church with the minister, board members, executive team, and capital campaign team</p>
<p>2:00 - 3:30 PM</p>	<p>Open facilitated workshop attended by ~25 people</p>
<p>3:30 – 4:00 PM</p>	<p>Brief recap with capital campaign team members, discussion of high level recommendations and timeline</p>
<p><b>Sunday, Oct 14</b></p>	
<p>Immediately after first service (between services)</p>	<p>Barry to attend and participate in worship service, led by Rev. Peter</p> <p>Fifteen minute presentation by Barry, offering his observations and recommendations.</p>
<p>After the second service (12:30 to 1 pm)</p>	<p>Thirty minute presentation by Barry, covering his observations and recommendations, with time for Q&amp;A</p>
<p>Following open forum after second service (1 pm to 2 pm)</p>	<p>Meeting with board, Rev Peter, and capital campaign team to answer any remaining questions and to provide more specific, next-step recommendations.</p>
<p>2 PM</p>	<p>End of visit</p>

## Appendix B: Outline of Worship Service Homily

I am one of the crazy ones – who likes talking with UUs about money. My stewardship ministry – why do I do this, a story about what drives me. My faith journey started out in SJ in Arlington, VA. We did great work providing sanctuary for central American refugees in the 1980s, hosting a rotating homeless shelter for a week at a time much as you do via Family Promise. NH civil union law.

This is just one reason why I'm passionate about UUism, and whatever we can do invest in and ensure that our faith thrives today and always. 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. Of course, much more needs to be done and we have to make sure we are healthy and strong, to be what is needed for a time such as this. We are called on to be a sanctuary for the vulnerable and a focus for activism and resistance.

I think about the impact we UUs have had on issues like marriage equality, BLM, OWL, welcoming congregation, green sanctuary, social action networks. As a small denomination, we have had and continue to have outsized impact. 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 proud of.

Imagine how much we could accomplish with additional resources, with additional investment. You are seeing that with the grant funding you're your outreach and growth initiative. 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. Your mission is wonderful:

- IGNITE personal growth
- ENGAGE in loving community
- SERVE with integrity

And it felt like you are living out your mission in everything you do.

Sanctuary – this month's soul matters theme which we are using in Wilmington as are you. The notion of sanctuary calls to me, offering a place of refuge, courage, recharging. For our members and for vulnerable people, and for the world. My first time experiencing sanctuary – right nearby on the Penn campus. We need to invest in our UU sanctuaries.

Especially love 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 like the one you've just adopted. 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.

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 UUCDC's mission? UU in a time such as this – post-election. Families separated at the border, kids kept in detention; environmental degradation; the 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 learned some things about UUCDC this weekend that tell me that not only can you do this, but it will be easy. I mentioned over the weekend that I love music, I love to sing and play several instruments, but a funny thing, I don't usually pay all that much attention to the lyrics – it's the music that gets me. But right now, what keeps running through my mind are these lyrics from the Fire of Commitment:

When the fire of commitment sets our mind and soul ablaze, when our hunger and our passion meet to call us on our way, when we live with deep assurance of the flame that burns within, then our promise finds fulfillment and our future can begin.

Strong images of souls ablaze, passion, deep commitment, fire burning within – I saw this kind of passion and enthusiasm this weekend. The people I met just flat out love this church and love being with one another and ministering to one another and to the world. And you brought that love, passion, enthusiasm, energy to all of the meetings with me. I was blown away.

I also learned that you are able to talk with each other, to share your special moments at UUCDC, to share your passions, to share your commitment to this wonderful congregation. This combination is unbeatable. You will be able to talk with each other about your hopes and dreams for the future of the church and how this capital project and campaign fit in. You will also be able to talk about how will find and contribute the money to bring your dreams to life.

Look around at this place and your fellow congregants. Think about the leaps of faith that brought us to this place and time. How many of you were here for the last capital campaign that built this beautiful sanctuary? Think about the courage and commitment it took. You are ready to take the next leap of faith and do your part building the next piece of the puzzle for the future.

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.

## Appendix C: Survey Form

### Next Steps Weekend Survey -- UU Church of Delaware County (UUCDC)

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

1.

2.

3.

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

1.

2.

3.

## Appendix D: Survey Results

(45 Respondents)

Word Clouds for the open-ended questions 1, 3, and 4; table for Question 2 on growth preference.

### Q1: Major Milestones



### Q2 Growth Preference

ANSWER CHOICES	RESPONSES	
1. no numerical growth	0.00%	0
2. 5 percent annual increase in membership	38.64%	17
3. 10 percent annual increase in membership	34.09%	15
4. 15 percent annual increase in membership	11.36%	5
5. greater than 15% annual increase in membership	15.91%	7
TOTAL		44

### Q3: Strengths



### Q4: Challenges



## Appendix E: Organization, Roles and Responsibilities

Group or Team	Role	Notes and Comments
Board, Minister, ET, and Program Staff	<ul style="list-style-type: none"> <li>• Be vocal and visible supporters and proud and generous contributors commensurate with means</li> <li>• Recruit key leaders</li> <li>• Help identify and solicit lead donors</li> <li>• Arrange congregational votes at approval milestones to ensure buy-in</li> </ul>	<ul style="list-style-type: none"> <li>• Make the project and capital campaign a high priority for the board and congregation</li> <li>• Schedule formal and informal congregational votes throughout</li> </ul>
Steering Committee	<ul style="list-style-type: none"> <li>• Oversee and coordinate the entire effort</li> <li>• Ensure coherent messaging and communication plans across the project and finance/campaign teams</li> <li>• Provide a role for lead donors</li> <li>• Ensure active and enthusiastic engagement with the congregation, including events, technology, tours.</li> </ul>	<ul style="list-style-type: none"> <li>• Involve people who are widely respected and trusted</li> <li>• Consider a sub-team for communication</li> </ul>
Building Project Team	<ul style="list-style-type: none"> <li>• Engage architect</li> <li>• Flesh out plans, continuing to link to mission/vision/goals</li> <li>• Devise and carry out communication strategy to engage the congregation</li> <li>• Develop conceptual designs at three different price points</li> <li>• Review the three plans with the congregation and vote to select the preferred plan</li> <li>• Develop case statement for the preferred plan</li> <li>• Flesh out cost estimates</li> <li>• Finalize plans following the capital campaign</li> </ul>	<ul style="list-style-type: none"> <li>• Choose an architect who has experience working with churches and renovations, and can engage the congregation effectively</li> <li>• Seek to identify all cost elements and drivers from the outset and assist in developing the long range financial plan per Recommendation #3</li> </ul>
Campaign Team	<ul style="list-style-type: none"> <li>• Begin early planning for the 2019-20 annual campaign – especially critical as a visiting stewardship infrastructure must be built from scratch</li> <li>• Carry out an excellent annual campaign</li> <li>• Analyze annual giving patterns to develop a thorough understanding of the potential donor base</li> <li>• Develop an essential gifts chart to show the range and number of contributions of various sizes that will be needed to reach specific capital campaign goals</li> <li>• Begin identifying and engaging potential lead donors</li> <li>• Work with finance volunteers and staff to ensure accurate and consistent pledge data</li> <li>• Work with the Building Project Team in advance of the Financial Feasibility Study (FFS) to ensure a strong case for capital campaign giving</li> <li>• Devise and carry out mechanisms for educating the congregation about capital campaign giving and sources of money; and for communicating early and often throughout the campaign</li> <li>• Arrange for the FFS, identify interviewees, assist with logistics</li> <li>• Conduct capital campaign assuming positive results of the FFS and congregational approval</li> </ul>	<ul style="list-style-type: none"> <li>• Consultant to assist in campaign planning</li> <li>• Assist in the effort to develop a long range financial plan per Recommendation #3</li> <li>• Engage the ministers and board to approach potential lead donors (consultant to assist)</li> <li>• Communicate stories from other congregations about sources of capital and annual campaign contributions (consultant to assist)</li> </ul>

## Leadership Roles within the Campaign Team

### Key Points

- The roles described below all need to be performed, but should be tailored to the skills and capacities of the team members. Roles can be combined or otherwise reconfigured to suit.
- Involve many people in the capital campaign in other jobs beyond the roles of leaders. These additional people need not come to meetings or even join the team, and some of the jobs can be one-time. See below for suggestions.

### Roles of Core Team Members

#### Co-chairs:

- Oversee and coordinate the entire campaign
- Coordinate with parts of the church beyond the campaign – minister, staff, program areas
- Chair meetings and ensure that records of decisions are made
- Oversee recruitment of core team members and others – enlisting others, such as the board, program staff, and committee chairs, for help with recruiting
- Ensure that a master schedule is created and updated, working with staff or lay leaders to coordinate with church calendar, to track that everything is done when needed
- Ensure that a master budget is created and maintained to track expenses
- Conduct a lessons learned assessment at the conclusion of the campaign
- Ensure that a process is established to track receipts, follow up with any pledgers who request later contact, invite new members to pledge

#### Visiting Steward Leader:

- Coordinate the recruiting of visiting stewards, drawing on many other people to help
- Identify materials needed for the stewards and work with Publications and staff to get them produced
- Coordinate the visiting steward training sessions
- Assign stewards to families to visit
- In conjunction with other leaders, identify target amount (ask) for each family to be visited (for capital campaign)
- Oversee the visiting steward activities during the pledging phase and ensure that everything stays on track

#### Publications Leader:

- Identify and schedule all the materials needed including brochures, letters, pledge forms and envelopes, thank you cards, invitations to events
- Coordinate with Communications on branding and logo
- Determine when and how each item will be designed, drafted, and produced
- Oversee production and ensure that everything is produced when needed
- Identify resources needed and when, and coordinate with Co-Chairs for budget tracking

**Communications Leader:**

- Develop a communications plan and schedule, noting for every planned communication, when it will occur, the key message points, who will do it, what mechanism will be involved (pulpit, eblasts, letters, social media, bulletin board, info table, etc.)
- Recruit people to develop the various pieces and track that the communications program proceeds on schedule
- Oversee the communications plan, monitor effectiveness, and make modifications to messaging, schedule as needed

**Events Leader/Party Planner:**

- Work with the core team to identify and schedule events to include major campaign events (leadership reception, kick-off Sunday, celebration) and other special events such as facility tours
- Recruit any additional event/party planners needed
- Develop budget and coordinate with Co-chairs
- Work with Publications to develop and send out invitations; manage RSVP process
- Work with the Core Team to plan and develop the program for each event – agenda, speakers, materials, etc.
- Put on the events and assess effectiveness in terms of attendance and other measures

**Follow-up Lead:**

- Devise a plan for trying to contact the people who could not be reached by the visiting stewards, normally some combination of phone, email, and mail
- Recruit people to make calls and/or send emails and follow up. Consider arranging a phone bank party, and ask the board and committee chairs to participate

**Database and Tracking Lead:**

- Coordinate with staff to create an initial database of families to be visited. Determine mechanism for tracking activity of the visiting stewards and status of pledges as they come in – spreadsheet, church database?
- Track progress during the campaign and prepare weekly summary and detailed reports
- Prepare final data set and report
- Ensure that a process is in place to track receipts and follow up quickly if members fall behind – view this as a pastoral or engagement issue

**Potential Capital Campaign Ad Hoc Tasks**

Here are some ideas for involving as many people as possible; you can surely come up with others:

- Tour guides – to enable members to see and experience the need for facility improvements and the value of dreams for the future
- Party hosts – family willing to offer their homes or host a specific event at church
- Social media experts – set up a Facebook page for the campaign and determine other social media approaches for engaging people
- Info table staff – volunteers to people a table with info about the campaign after Sunday services

- Youth – figure out a way to engage youth in visioning and planning for the project; consider inviting youth to be tour guides, table sitters, etc.
- Cooks and bakers – to prepare meals and snacks for visiting steward training; or to liven up tours, town hall meetings, the info table, etc.
- Graphics specialists – to design logo and branding, lay out brochures and other materials, etc.
- Errand runners of various kinds – to order or shop for items, arrange for printing and collating, creating folders for visiting stewards

## Appendix F: Preliminary Timeline

Month	Key Activities and Milestones: Building Team	Key Activities and Milestones: Campaign Team
November 2018	<ul style="list-style-type: none"> <li>Issue RFP to the three finalist architect firms</li> <li>Receive and review proposals, check references, invite in for presentations/interviews</li> </ul>	<ul style="list-style-type: none"> <li>Develop detailed communication plan version 1</li> <li>Develop detailed plan and schedule for the 2019-20 Annual Campaign scheduling key dates and events</li> <li>Determine a strategy for one-on-one visits, number of stewards needed, and plan to reach those not visited</li> </ul>
December 2018	<ul style="list-style-type: none"> <li>Select and engage architect</li> <li>Begin defining detailed program requirements and multiple design concepts; meet with any groups to clarify requirements</li> </ul>	<ul style="list-style-type: none"> <li>Recruit for any needed leadership roles for the Annual Campaign</li> <li>Recruit visiting stewards and schedule training</li> <li>Develop logo/brand and identify and schedule all materials needed</li> <li>Develop and begin carrying out a donor cultivation strategy for potential major givers to the capital campaign</li> </ul>
January 2019	<ul style="list-style-type: none"> <li>Develop final versions of the three design concepts</li> <li>Develop high level cost estimates for the three concepts</li> </ul>	<ul style="list-style-type: none"> <li>Create a program/mission budget and a case for generosity</li> <li>Develop brochure and other materials for the annual campaign</li> <li>Visiting steward training</li> </ul>
February 2019	<ul style="list-style-type: none"> <li>Arrange multiple forums for engaging the congregation to review the three design concepts: including tours, information sessions, meetings with the architect, etc.</li> </ul>	<ul style="list-style-type: none"> <li>Leadership event, followed over the next 2 weeks by leadership visits and pledging</li> </ul>
March 2019	<ul style="list-style-type: none"> <li>Conduct informal congregational preference vote to choose a design concept</li> </ul>	<ul style="list-style-type: none"> <li>Annual campaign formal kickoff, with covenant</li> <li>Stewardship visits (3 weeks)</li> </ul>
April 2019		<ul style="list-style-type: none"> <li>Follow-up to reach people not visited (may start earlier for people not visited this year)</li> <li>Financial Feasibility Study (FFS)</li> </ul>
May 2019	<ul style="list-style-type: none"> <li>Refine plan based on results of the Financial Feasibility Study</li> </ul>	<ul style="list-style-type: none"> <li>Assessment of the campaign and the stewardship visit process</li> <li>Congregational vote to proceed with the capital campaign</li> <li>Line up lead gifts based on FFS and donor cultivation strategy</li> </ul>
June, July, August 2019	<ul style="list-style-type: none"> <li>Continue the hoopla to talk up the plans</li> </ul>	<ul style="list-style-type: none"> <li>Continue the hoopla to educate and inspire about the campaign and where people will find the money</li> <li>Recruit additional visiting stewards</li> </ul>
September 2019	<ul style="list-style-type: none"> <li>In-gathering focus on the project and campaign</li> </ul>	<ul style="list-style-type: none"> <li>In-gathering focus on the project and capital campaign</li> <li>Visiting steward training</li> </ul>
October 2019		<ul style="list-style-type: none"> <li>Leadership event followed by leadership visits and pledging</li> <li>Capital campaign kick-off and stewardship visits</li> </ul>
November 2019		<ul style="list-style-type: none"> <li>Stewardship visits</li> <li>Follow-up</li> </ul>
December 2019	<ul style="list-style-type: none"> <li>Refine plans based on capital campaign results</li> <li>Plan for next phases: selecting a contractor if not already done, soliciting firm bids, planning for groundbreaking</li> </ul>	<ul style="list-style-type: none"> <li>Follow-up</li> <li>Revise long-range financial plan based on capital campaign results</li> <li>Celebration!</li> </ul>

### Appendix G: Strategic Financial/Resource Plan Template

Cash Flow: Revenue	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)								