Unitarian Universalist Fellowship of Durango

Next Steps Stewardship Consult

February 2025

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Stewardship FOR US

Building Cultures of Generosity and Commitment

My Background

- 24 years of professional fundraising experience
- Stewardship for Us Team
- Unitarian Universalist for 32 years
- Passionate about helping you fund your mission, vision, programs and building projects!

My Time with UUFD

- Reviewed lot of data in advance
- Conversations started in December
- Meetings this week & weekend
  - Board, Staff, Stewardship, Membership, Worship Arts, Family Ministry & Faith Formation, Social Justice …
- See/hear how you are doing & your goals
- Recommendations for moving forward

Greatest Strengths

(from online survey)

Community/People = 73%

Minister/Staff = 50%

Social Justice = 46%

Sunday Services = 41%

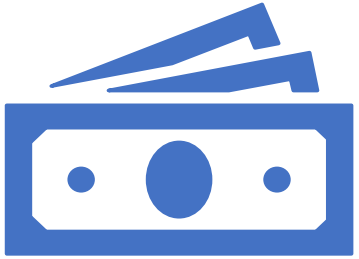
Greatest Challenges (from online survey)

Facilities / Buildings

61%

Membership Growth

61%



Financial Stability

59%

Top Priorities (from online survey)

- Membership Growth — 48%
- Social Justice / Outreach — 48%
- Facilities / Campus – 39%
- Expand Volunteer base – 38%

Support for Capital Campaign

(from online survey)

- 50 of 56 answered Q
- 82% said Yes
- 18% said No

Annual Pledges

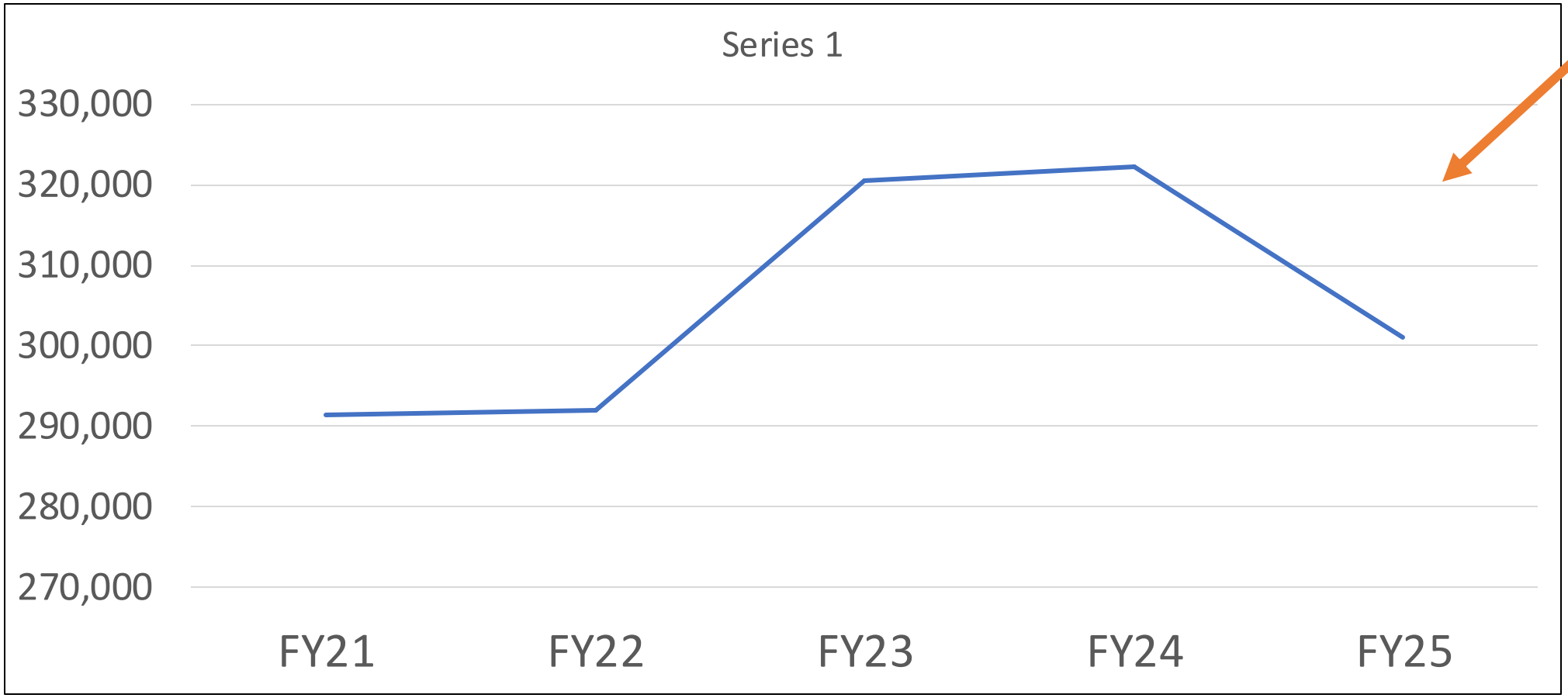
Average Pledge

$3,384

Median Pledge

$1,500

Pledges 2021-2025



Pledge Ranges

Percent of Pledges	# of UUFD Households	% of UUFD Households	Giving Ranges Yearly Amounts
25%	3	3%	$24,000 - $36,000
25%	7	8%	$7,500 - $15,000
25%	16	19%	$2,700 - $6,100
25%	60	70%	$5 - $2,500

Readiness for Capital Campaign

- A compelling Vision and Plan
- Awareness of need(s) by congregants
- Sense of urgency
- Consensus on your path forward
- Engaged congregation with low conflict
- Healthy Annual Stewardship
- People willing to make it happen!

Guidelines for Capital Campaign

- Typical range is 3x-5x your annual giving

  ~$300K annual → ~$900K to $1.5 Million

- Some outlier results in recent years

  → 6.5, 8 and 9.75x annual giving

- Pledging over 3-year period

  → usu. ≥ 50% given in first year

Tips to Get There

- Lead gift of at least 15-20% of total
- An even larger cornerstone gift can be transformative & inspiring!
- Need financial, intellectual, and spiritual buy-in tied to shared vision

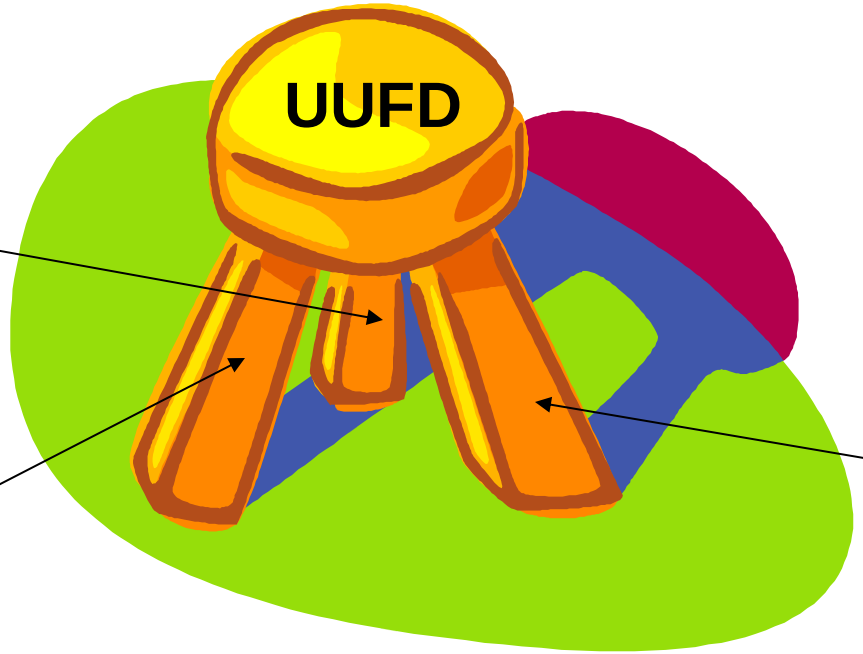
Funding Programs & Building

- Continuing annual support is essential
- Annual funding takes priority over capital if a household can only give to one or the other
- Now is the time to step up for annual, before any capital campaign!
  - Pledge for this new era of congregational life
  - Programs and building beloved community very important today!

3 Areas of Giving

PLANNED GIVING COMMITMENT = ESTATE

ANNUAL FINANCIAL COMMITMENT = INCOME



CAPITAL FINANCIAL COMMITMENT = ASSETS/SAVINGS

Phases of the Process

- Next Steps Consultation
- Define / Refine Vision Together
- Financial Feasibility Study
- Refine Scope of Project if Needed
- Capital Campaign

Compliments

- New energized, loving settled minister
- Lots of engagement by the congregation
- Membership engagement thoughtful & welcoming
- Multi-faceted meaningful justice work
- Faith Formation enrollment rebuilding post COVID
- Many great ideas on how to move forward
- Big campus with space to expand & beautiful sanctuary

Observations

- Wide range of views on readiness for a building project
- Lots of great ideas not widely known within congregation
- Annual pledges need better distribution
- Overall pledge total can be increased
  → position annual funding well if head into a capital campaign next year

Recommendations

- Do some 2025 visioning together
- Update building plans from 2018 and gather feedback from congregation in today's world
- Focus on how any new or renovated space could help you live into your mission
- Step up annual pledging *this year* before you head into a capital campaign

Big Picture Ambitious Timeline

- Spring & Summer 2025: Vision together for today and tomorrow; how does a building project fit in that vision; gather input; prioritize
- Fall 2025: Financial Feasibility Study; wrap project around FFS results; decide/vote how to move forward
- Winter 2025-26: Campaign planning; leadership phase
- Spring 2026: Combined Campaign

Looking Ahead

- Hold each others' hearts in your hands
  - ✓ Listen attentively
  - ✓ Express appreciation often
- Opportunities for input and dialogue are very important
- Give yourself time to do that well

Closing Words

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 long after we are gone our work will continue to be a living thing.

Remember that our children and grandchildren are going to do things that would stagger us.

So, make no little plans. ~ Daniel Burnham

Thank You!

I hope our time together was valuable to you.

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