

FORTH Progress Report
All Souls Church, Unitarian
March, 2009

What have been the significant accomplishments of the Stewardship Team in the last year? Disappointments or frustrations?

Accomplishments:

- The fact that we **came together** as a Stewardship Team was the first accomplishment. The group started in January '08, but it took us until about April '08 to understand our purpose, and until September '08 to start functioning as a group. We had most of the key members identified, but not the reason for having the group.
- The key turning point was an understanding of **pledge data**. Prior to that we were dealing with good intentions and nice words, but no tangible information to focus our conversations. The data was a catalyst and provided a major shift in the view of the stewardship team.
- We were able to construct a **mission** and identify **focus areas** (copy attached below), which helped us understand how to function as a group. We see ourselves as an oversight and policy group for the major components of our fundraising efforts. With that as grounding, we are able to identify the overarching issues, discuss ways of dealing with them, and identify individual roles.
- We met at Phyllis' home and at Jeff's home, which made a big difference in building camaraderie and trust. The warmth and elegance of the setting made the group feel special.
- We are amazed at how big the group is, yet everyone has a specific role and all are needed.
- One opportunity was to integrate the **Generosity Campaign** (aka the annual budget drive). We were able to better support their efforts, provide a sounding board for some of their decisions, and be sure other efforts did not dilute or compete with their activities. They were also able to keep us informed about progress, so the benefit was mutual.
 - We did pilot a **Visiting Stewards** program this year, with the Stewardship Team providing significant support and people power
 - We provided much more specific **financial data** to the congregation this year (i.e. that it costs about \$2k per person per year to run the church). That had not been done before, and we believe it was beneficial to have the backing of the Stewardship Team as the Generosity Team broke new ground around information sharing.
- Another opportunity was to integrate fundraising efforts that had here-to-fore operated independently and without much support.

- The other major event has been an Auction. The Stewardship Team designated a sub-group to work on options, and they identified an **Inaugural Ball** as an opportunity. A dedicated group created a stellar fund raising event. Beyond the significant dollars raised, it was an opportunity for congregants to contribute their enthusiasm and skills.
- Because the Inauguration was unique, we can't repeat that event. We'll need to find a different way to raise those funds next year. The Ball did demonstrate, however, that All Souls folk like to dress up, dance and party, and that we need more social activities to balance our social justice and spiritual growth activities.
- The creation of a **Bed-And-Breakfast** had been discussed in earlier years and a person recruited to lead the effort, but was also operating independently. We brought it under the umbrella of Stewardship, which we believe supported those dealing with the operational details, as well as providing a venue for vetting policy decisions.

Disappointments:

- The availability of data and background to know where we've been and where we are has been frustrating. We believe more data and information will only strengthen our ability to be collaborative and strengthen our overall stewardship goals.
- A few committees that are integral to the stewardship team should be strengthened to meet overall goals.
 - The **Membership** committee needs to be strengthened and take on more activities about integrating members into the life of the church. We get folks to sign the book, but are under-resourced when it comes to getting them involved. Membership is represented on the stewardship team.
 - There is not a formal **Buildings & Grounds** committee, and this will be needed as the church moves toward consideration of a capital campaign. This is an important advocacy group to build, especially in light of the significant needs of our very old and very large building.
 - The **Finance** committee of lay members who work on following up on pledges during the year, but are not involved in the budget so there is not clarity on the Stewardship team's involvement in the budget.. . The Director of Finance and Administration is a staff liaison to the Stewardship Team.

What difference has it made (to the church staff, members, lay leaders/Board) to have a single Stewardship Team, rather than several separate committees?

- The impact of having a Stewardship Team has been significant to the members of the team itself, but the benefit to others beyond the team will probably manifest itself in the future.
 - The main benefit is having a group interested in hearing information that also have an interest in doing something with it.
- The Executive Director indicates she feels very supported in her work by having the Stewardship Team in place. To other staff, lay leaders and Board, it is probably less consequential at the moment.
- There may be a tendency to believe that the Stewardship Team will “fix” everything related to funding and budgets.

What, if anything, have you learned about your church through your work together?

- We have an appreciation of how much infrastructure (database management, follow up, attention to process and detail) is really needed to support a robust stewardship effort in a large organization.
- We have seen how membership growth has been more of a cost than a benefit from a purely financial point of view. We have not kept up the administrative support needed, either on the lay or staff side, and the education about what it takes per member (i.e. \$2,000 vs. \$250) is a long process that requires constant work.
- Planned giving is a long term activity, and we are confident that it is on the right track and has the right amount of attention for now. There is a member of the Stewardship Team focused on planned giving efforts.
- We find we spend more of our time talking about events, which bring in relatively small amounts of money, and less time talking about the Generosity Campaign, which brings in the vast majority of the support. So, we need to find a way to balance that, and perhaps channel “events” discussions to a different venue. An events team has been discussed.
- We realize that RE drives growth at All Souls, and want to engage the RE folks to talk about how to work more closely. We want to advocate for the support of the RE program and engage RE families more closely in support of the church. There is RE committee representation on the Stewardship Team.

What goals or projects are next on your list? (And what do you need/hope for from the church, and/or your FORTH consultant, to facilitate success?)

- Advocate for additional administrative staff to support ambitious funding elements and to follow up on all the activities and communications
- Membership involvement is an area of church activity that needs additional attention.
- We need to further define the Stewardship Team's and make ourselves known to the church as a whole
- We hope the Bed & Breakfast is sustainable, and will be evaluating how to make it an ongoing concern
- The Capital Campaign has many open issues to be addressed. The Stewardship Team is prepared to support the capital campaign planning process being lead by the Capital Assets Planning team.

All Souls Church - Stewardship Team
Mission & Roles

Mission

- To develop and sustain a culture and operation of stewardship at All Souls Church, in order to fund for our mission, membership and facilities on an ongoing basis.

Responsibilities

- Develop strategies to raise revenue to fund our ministries
- Identify and manage challenges that might prevent us from reaching our goals
- Lead the development and implementation of a long term strategy for funding

Focus Areas

- Generosity Campaign
- Major Donors
- Planned Giving
- Fund Raisers
 - Bed & Breakfast
 - Auction
 - Grants
- Capital Campaign (Research, Knowledge, Strategy)
- Membership Education & Commitment

Enablers & Ongoing Activities

- Communication & Education (focus on messaging)
- Website mechanisms for receiving donations
- Data Analysis & Tracking (to inform our activity)
- Staff & Ministry Team Collaboration
 - Finance & Administration
 - Religious Education
 - Investment Committee
- Committees needed to support overall Stewardship
 - Finance
 - Membership
 - Building, Grounds & Accessibility

<h3>Stewardship Team Members and Key Roles</h3>

Phyllis Caldwell - co chairs
Jody Feldman - co chairs

Allison Denny - Generosity co-chair
Aaron Knight - Generosity co-chair

Jeff Richardson - Major Donors
Herb Lowrey - Major Donors

Laurie Lester - Events & Auction
Anna Hargrave - Events & Auction

John Miller - Planned Giving Lead
Meredith Higgins Hargrave - Planned Giving team

Marion Connell - Bed & Breakfast
Josephine Nieves - Board Liaison
Martha Kettele - Membership
Katie Loughary - Dir of Finance & Administration
Mark Ewert - Generosity consultant
Mark Flood - Investment Committee Liaison

Julie Agarwal - At Large
Eliza Klose - At Large