



Next Steps Weekend (NSW) Report



First Parish Brewster Unitarian Universalist

June 2022

Barry Finkelstein



Stewardship FOR US
Building Cultures of Generosity and Commitment

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Executive Summary

This report presents the results of a Next Steps Weekend (NSW) engagement with First Parish Brewster Unitarian Universalist (FPBUU), focused on readiness for a Capital Campaign. The project was conducted by Barry Finkelstein, a UU congregational stewardship consultant with *Stewardship for Us*.

Highlights:

- The primary finding of the NSW is that FPBUU is well positioned to proceed toward a capital campaign at a measured pace that reflects the realities of this moment
- First Parish Brewster has numerous strengths on which to build a successful campaign

This report presents a recommended path forward and timeline that begins now and proceeds to a Combined Annual/Capital Campaign in the Winter/Spring of 2024. Major steps along the path are:

1. Define an inspiring project that furthers the Church's mission and enjoys broad support
2. Develop a strategic and comprehensive financial/resource plan to ensure financial sustainability and help engage and educate the congregation about money and its impact on mission
3. Plan and conduct an excellent Annual Stewardship Campaign in Spring 2023 to solidify finances and set the stage for a successful Combined Campaign the following year. A key milestone in the lead-up to the Combined Campaign is a Financial Feasibility Study to be conducted in Spring 2023.

A robust Communication Plan will overlay and support the entire process, engaging the congregation in multiple ways, involving many people to educate and inspire, and generating momentum and enthusiasm.



Context: Objectives

- **FPBUU Goals for the NSW:**
 - Invite the congregation to dream of our future
 - Exercise our financial muscle, build awareness and confidence
 - Understand the capital campaign process, move at the speed of trust
- **Stewardship for Us Consulting Goals:**
 - Learn about FPBUU to tailor recommendations and process
 - Provide an opportunity to work together as we start on the path
 - Begin to generate enthusiasm and confidence among First Parish members



Context: Capital Campaign Goal and Vision

- The goal of the capital campaign is to *Widen the Circle of Welcome* by creating a gathering space that is inviting, accessible, and functional so that we can host public events and build a diverse, multigenerational Beloved Community
- The project will support this goal by:
 - Creating a certified kitchen.
 - Improving accessibility by installing an elevator.
 - Providing one central main entrance that improves access and traffic flow.
 - Ensuring that there is sufficient parking that includes a handicap accessible lot.
 - Offering functional, attractive, classrooms for children's and youth ministries.
 - Providing multimedia technologies (projector, screen, t-coil) to improve access.
 - Preserving and enhancing our historic buildings (including Dawes Hall)



Context: Process

- Advance preparation included conversations with Church lay leaders and Rev. Jessica Clay, and with Hilary Allen, your UUA Congregational Life primary contact
- Reviewed extensive material in advance: financials, pledge data, governance, annual reports
- Met with about 73 people during the on-site weekend including:
 - Rev. Jessica and staff (Twinks Hastings and Karena Stroh)
 - Board and other leaders
 - Small group meetings
 - An open workshop on Saturday attended by about 35 people
 - A reporting and Q&A session following the worship service on Sunday
- Invited the 45 people who attended the Friday or Saturday sessions to respond to a 5-question survey, and 34 did so
- Delivered a homily in the Sunday morning service and a preliminary oral report at a well-attended gathering following the service
- Analyzed all information and produced this report



Basic Data

Name and Mailing Address of Congregation	First Parish Brewster Unitarian Universalist 1 Harwich Rd Brewster, MA 02631 508-896-5577
Website	FPBUU.org
Dates of NSW Visit	May 20-22, 2022
Minister/Program Staff	Rev. Jessica Clay, Minister Twinks Hastings, Lifespan Religious Education Director Kevin Badanes, Music Director Karena Stroh, Administration & Finance Director
Points of Contact	Susan Smith, President and Campaign Co-Chair Susan Flaws, Campaign Co-Chair
Number of Members Children & Youth Registered for RE	310 55
Fiscal Year	July 1 to June 30
Annual Operating Expense Budget (2022-23)	\$509,000
Annual Financial Commitments	\$332,000 as of May 2022, \$360,000 budgeted
Endowment (Permanent Funds)	Approx. \$1,300,000 (Spring 2022)
Approach to Annual Budget Drive	Varies over the years; been a while since face-to-face
Most Recent Capital Campaign	Renovate the Meeting House, 2005. Raised \$1,500,000 including substantial funds from the Town and Brewster residents



Data and Analysis: Survey

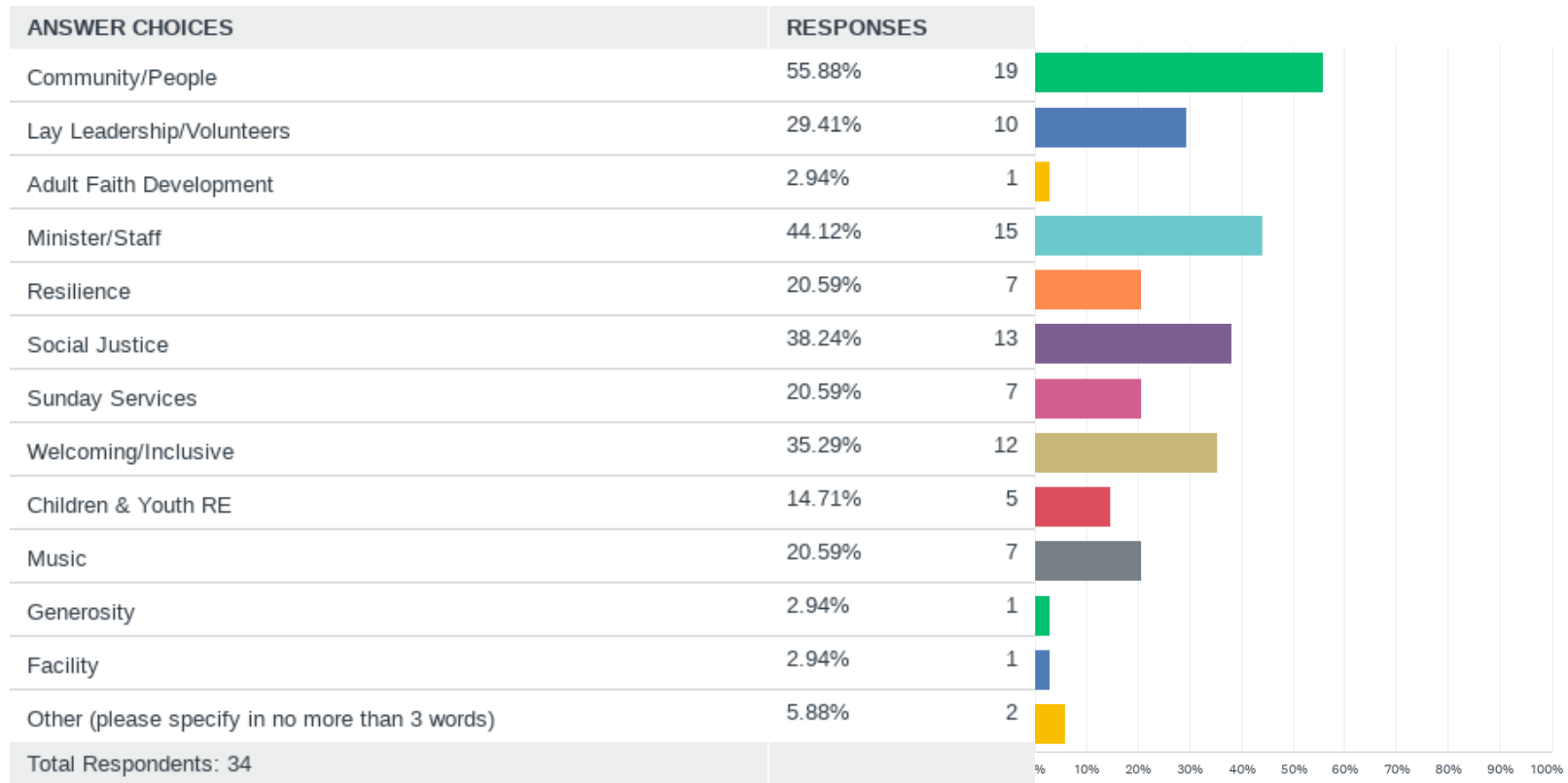
Thirty-four people who attended the Friday and Saturday sessions responded to a confidential Survey Monkey survey, asking these questions:

1. What are up to three important milestones or events in the history of FPBUU?
2. What are the 3 greatest strengths of FPBUU?
3. Are there any challenges FPBUU needs to address in the next five years? Please choose up to 3.
4. What are the 3 top priorities to further FPBUU's mission going forward?
5. Over the next five years, I would like to see our membership experience the following annual growth rate.

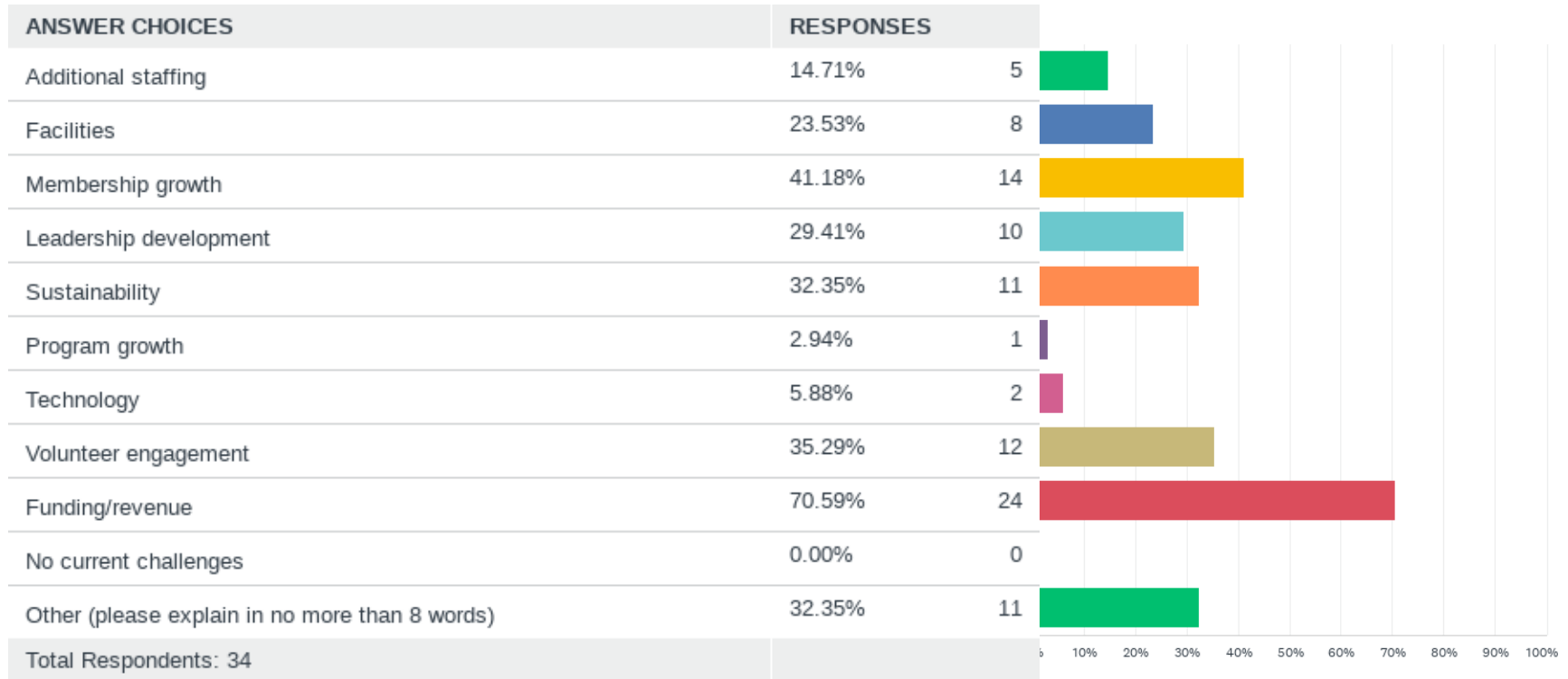
Results are presented on the following slides.



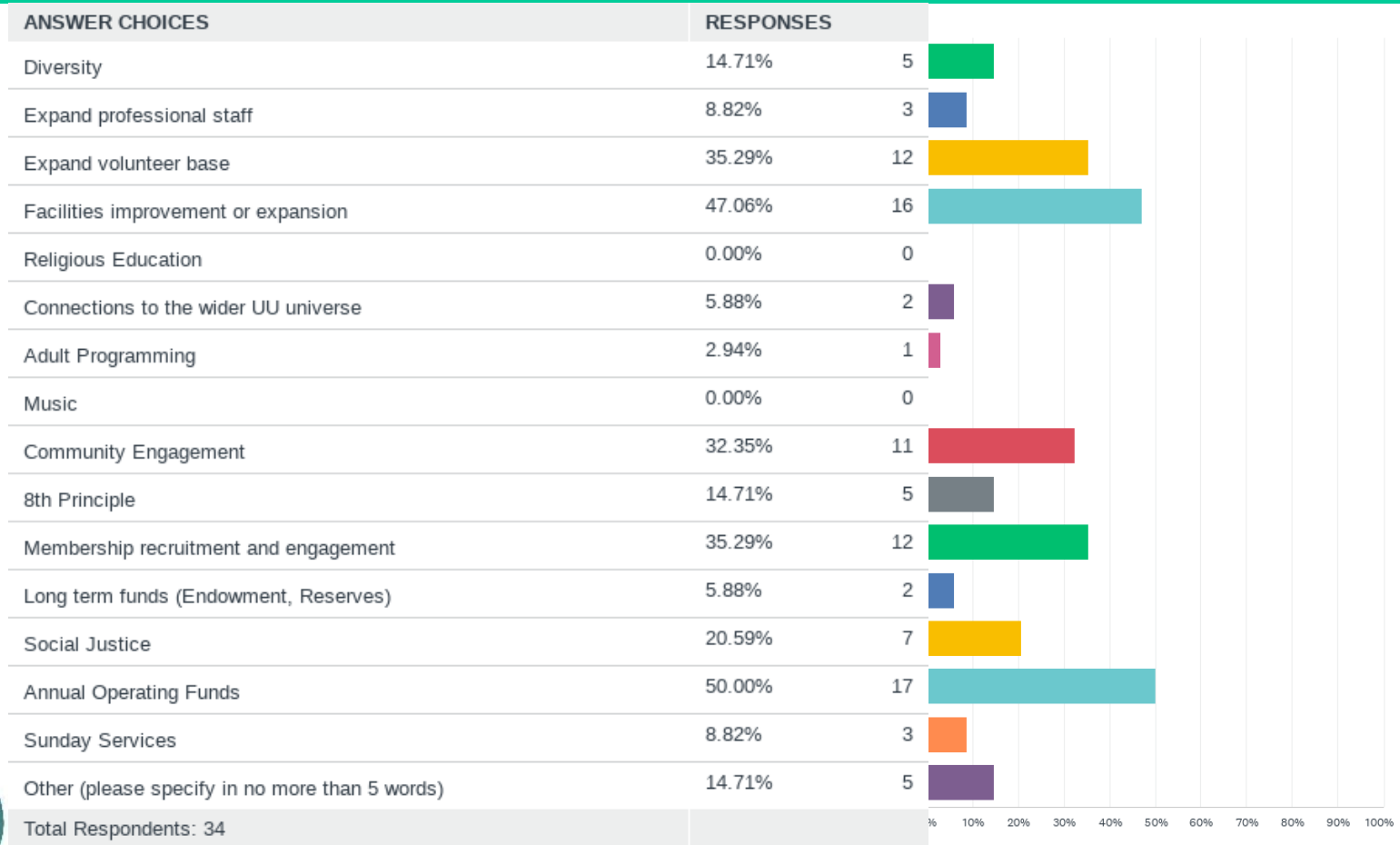
Data and Analysis: Survey Results – Q2 Strengths



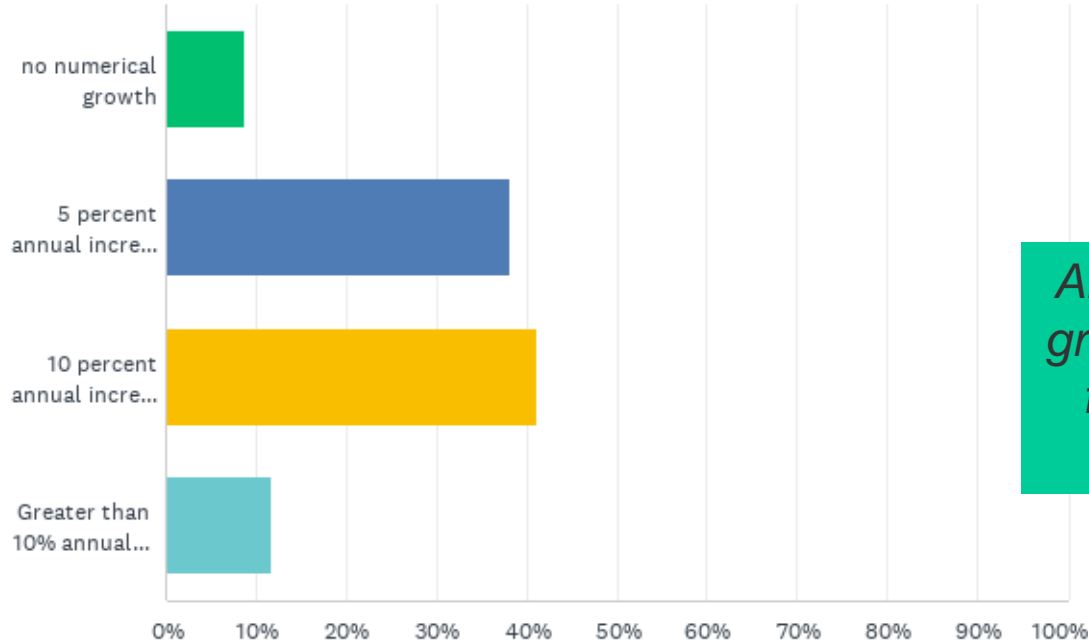
Data and Analysis: Survey Results – Q3 Challenges



Data and Analysis: Survey Results – Q4 Priorities



Data and Analysis: Survey Results – Q5 Growth Preference



All but 3 respondents favor growth. A strong preference for growth is a plus for a capital campaign

Data and Analysis: What's Special at FPBUU

Participants at the Saturday Open Workshop shared powerful stories of personal moments at FPBUU and identified the following special characteristics of FPBUU that enabled these events.

- We pull together
- Vespers services
- Small groups/Covenant groups
- Rev. Jessica
- Core values
- Mission and vision
- Inspiration
- Taking a chance
- Showing up
- Right to marry lawsuit
- Singing
- Determination
- Music ministry over Zoom
- People
- Community
- Commitment
- Loving support
- The message
- When you need something FPB delivers
- Love
- Social action
- Depth of thought
- Friends
- Caring
- Activism
- Identity



Data and Analysis: Overview of Financial and Other Assets

- First Parish Brewster has extensive assets – operating funds, pledging members, extensive campus, buildings and grounds, a sizable endowment, significant non-pledge revenue (Thrift store)
- FPB successfully obtained federal Payroll Protection Program (PPP) funds
- While total pledge dollars and number of pledge units for FY 2022-23 are significantly lower than the prior year, remaining PPP funds enabled a balanced operating budget
- And although pledge totals are lower, average, median, 80th percentile, and other metrics are up, reflecting the generosity and commitment of current pledgers
- Before even beginning any fundraising, members have given over \$175,000 in advance gifts to the Capital Campaign including a major gift of \$100,000 for a new kitchen
- Facilities are well-maintained and cared-for
- The Church recently paid off a 30-year \$555,000 loan from the endowment, after 20 years, leaving a small outstanding mortgage as the only debt (\$70,000 as of April 2022)
- The Endowment is healthy at ~\$1.3M, roughly 2.5 times annual operating budget



Data and Analysis: Pledging

Positives for 2022-23:

- 7 pledges of \$10K+
- Increases in mean, median, and 80th percentile from prior year

Note: 80th percentile is a useful benchmark, reflective of what a committed family with typical resources in the Brewster area might pledge: \$2,800

Year Over Year Comparison

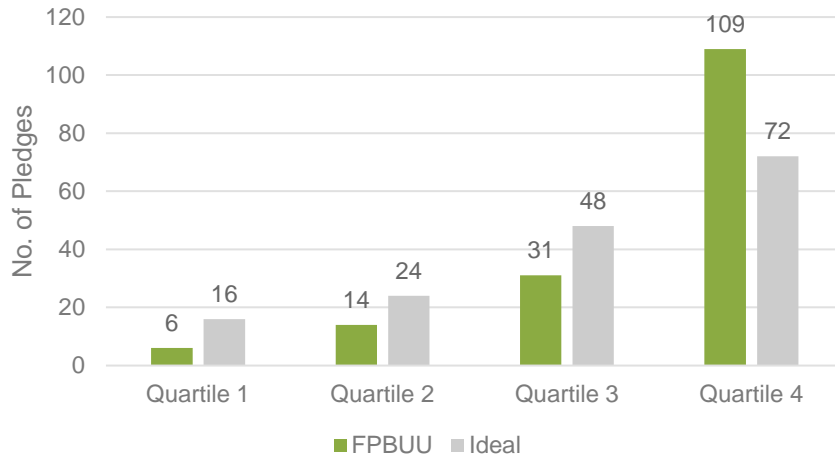
Pledge Metrics	FY 2020-21	FY 2021-22	FY 2022-23
Total Amount Pledged	\$ 360,968	\$ 378,474	\$ 331,959
Number of Pledges	207	205	160
Number \$10,000+	4	8	7
Number \$500-	67	61	48
High Pledge	\$ 18,000	\$ 17,000	\$ 18,000
Mean	\$ 1,744	\$ 1,846	\$ 2,075
Median	\$ 1,000	\$ 1,000	\$ 1,200
80th Percentile	\$ 2,440	\$ 2,400	\$ 2,800

Note: FY 2022-23 pledge total reflects status as of May 20, 2022; the board approved a pledge budget of \$360,000



Data and Analysis: Pledge Distribution

Pledge Distribution FPBUU vs. Ideal
(FY 2022-23)



Observations

- Six households (4%) that comprise the first quartile provide 25% of the dollars pledged
- Fourteen households (9%) in Quartile 2 provide another 25%
- Thus, half the money for annual operations comes from 13% of the households
- The fourth quartile comprises 109 households (68%)
- An “ideal” distribution would be more equitable and less vulnerable to loss of one or two of the largest givers, although few UU congregations achieve the ideal



Findings: Campaign Readiness

Positives:

- Wonderful physical assets – your expansive property with much long-term potential and prominent and beautiful historic meeting house – and the love with which you so clearly care for the property
- Excellent campaign leadership
- Legacy of doing great things: the First Welcoming Congregation in the US, support for the lawsuit that led to legalized gay marriage in Massachusetts, renovating the Meeting House
- Adopting a Congregational Covenant which is very helpful during a capital campaign
- Recent congregational and board visioning exercises
- Established a Financial Futures group to coordinate the efforts of the several organizations involved in finances
- Resilience and ability to support one another through difficult times
- Transition to virtual operations, and now moving to the next level in multi-platform ministry and operations; the Living Room setup is a great start
- Thriving Children and Youth Ministry and Music Programs, both of which functioned fully throughout the pandemic – an uncommon success story among UU congregations
- Commitment to racial justice, reparations, and the 8th principle
- Thrift Store which serves your social justice mission while generating significant revenue for the Church
- Certified Green Sanctuary, and extensive solar array promoting green energy generation
- And all those special characteristics and strengths from the Next Steps Weekend survey and workshop (Slides 10 and 14)

Challenges:

- Coming together around a common vision and an inspiring project that supports it
- Establishing a stewardship infrastructure and conducting an excellent Annual Campaign for 2023-24
- Challenging timing, as the congregation emerges from the pandemic and trauma
- Communicating in a way that reaches and inspires the entire congregation

Findings: Campaign Readiness

- FPBUU is ready to pursue a successful capital campaign
- The assets outweigh the challenges on the previous slide, and you can address the challenges as you proceed
- The good news is that the capital/combined campaign process is well understood, and you will be able to execute it
- More good news is that it is incremental and can be pursued at the right pace for you, which should coincide with the time required for defining the project and strengthening finances



Recommendations: Overview

- Take the initial steps toward a Combined Annual/Capital Campaign, targeted for the Winter/Spring of 2024
- Focus on three elements in parallel:
 1. Define a mission-driven project with strong support
 2. Develop a long-range financial/resource plan
 3. Carry out an excellent Annual Stewardship Campaign in 2023, as a basis for the Combined Campaign
- Overlay the above with an effective Communications/Engagement Strategy



1. Defining the FPBUU Project

- Establish a project definition team with broad representation
- Review past efforts and reports and current thinking
- Engage an architect who can work effectively with a UU congregation
- Ask the architect to create three options at different price points, e.g., :
 - Bronze: \$1,000,000
 - Silver: \$1,400,000
 - Gold: \$1,800,000
- Create high level summaries with tradeoffs
- Link all plan options to mission and vision
- Address historic preservation and any other permitting-related issues
- Engage the congregation at key points:
 - Formal and informal conversations in different forums
 - Begin generating excitement
 - Preference vote for single plan for FFS



Success Factors for the Project

- Exciting project with a clear link to mission and features that inspire: accessibility, green, community involvement, social justice
- Future-orientation
- Broad understanding and appeal
- Tangible benefits likely to be worth the investment cost
- Effective and engaging process for communication and decision-making



Remember: people give to mission



2. Financial/Resource Planning

Ask the Financial Futures Group to develop a 5-10 year strategic and comprehensive financial/resource plan

- Develop a model that includes all forms of money and other resources, assets, revenue and expenses
- Populate the model with baseline data
- Explore multiple scenarios to reflect different possible futures
- Use this process to engage the congregation as a vehicle for talking about money in a way that is more inspiring, exciting, and less stressful than the usual efforts



3. Annual and Combined Campaigns

Conduct an Excellent Annual Stewardship Campaign for FY 2023-24:

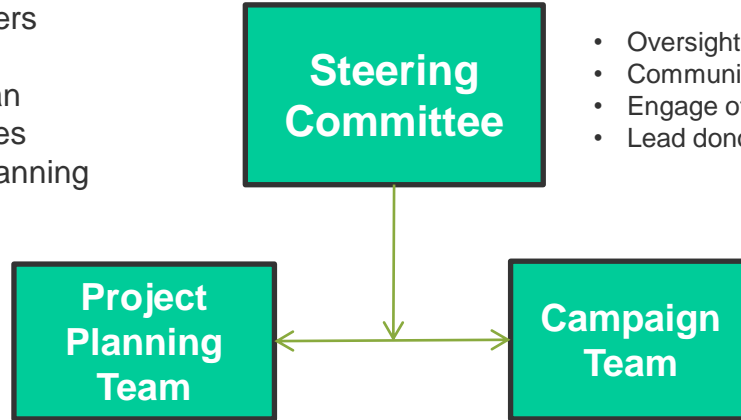
- Employ best practices and recruit the best talent
- Prepare for a successful face-to-face campaign:
 - Start planning early – this coming summer
 - Organize campaign team
 - Develop and carry out a multi-pronged communication plan
 - Recruit stewards
 - Conduct training
 - Develop management process to sustain momentum and rapid completion
- Conduct Early Phase for leaders and potential major givers
- Conduct general phase
- Evaluate results and refine process for Combined Campaign in Winter/Spring 2024



Organization: Involve Many People

Notes:

- Create three small core teams, supplemented by many volunteers
- Develop and execute a communication/engagement plan
- Coordinate with Financial Futures Team for Strategic Resource Planning



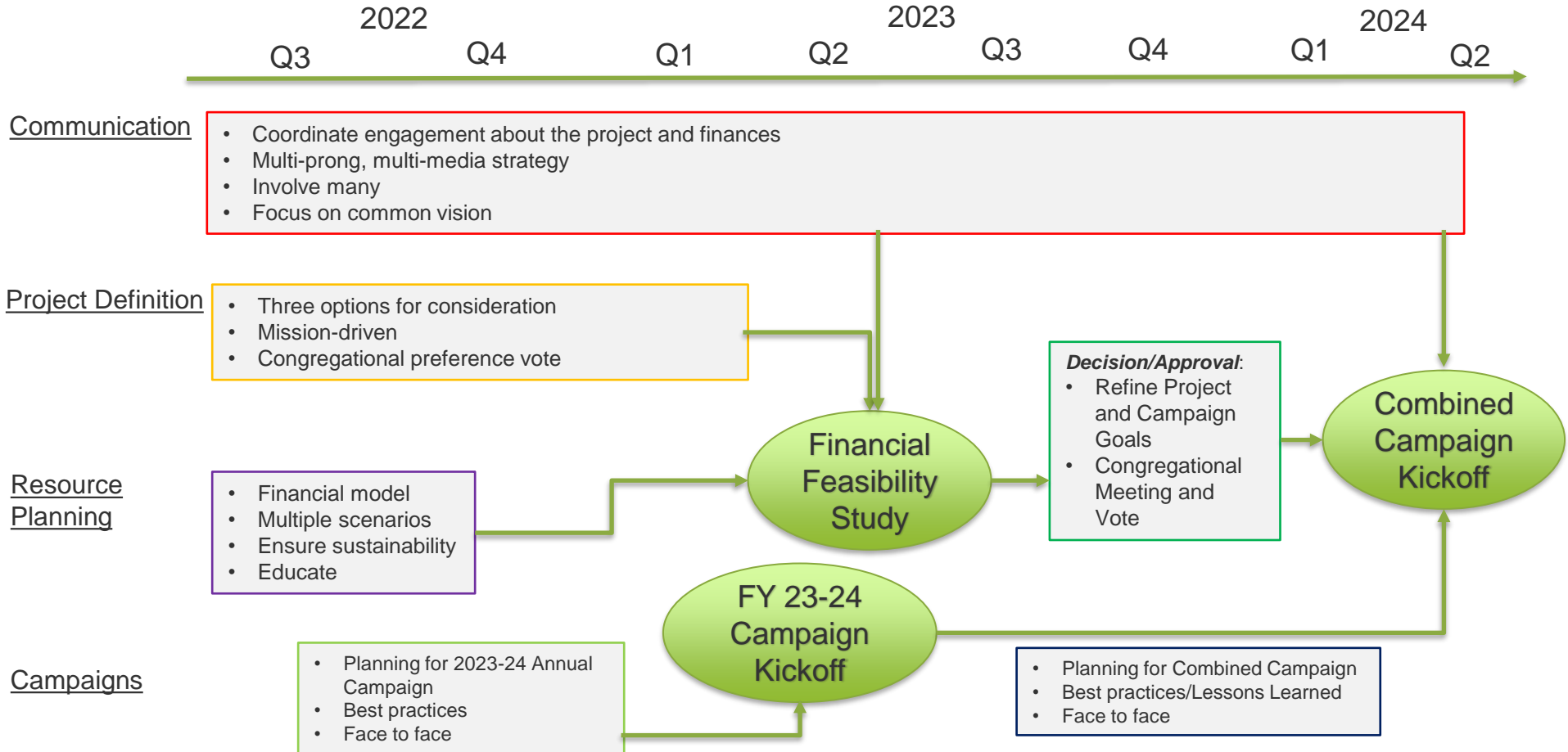
- Oversight & coordination
- Communication -- Hoopla
- Engage other leaders
- Lead donor cultivation

- Develop 3 plans at 3 price points
- Broad congregational involvement
- Tours, Town Halls, Videos
- Preference vote

- Campaign planning & execution for FY 2023-24 Annual and Combined Campaign in Winter/Spring 2024
- Lead donor cultivation
- Education & story sharing
- Leadership and general campaign phases



Initial Timeline



Capital Campaign Finances

- Establish separate account and inform people that early gifts are welcome
- Create or update gift acceptance policy, and ensure ability to accept gifts in all suitable forms, and inform the membership of policies and process
- Reach out to potential major givers and influencers to gage support and address concerns or questions
- Document financial management procedures and controls – designate a campaign treasurer
- Communicate progress regularly
- Establish or update procedures for investing and spending capital campaign money
- Set up processes to manage capital pledge fulfillment over the 3+ years
- Determine cash flow needs and sources



Recommended Campaign Consulting Support

Support	Scope of Work	Estimated Level of Effort & Labor Cost*
Financial/Resource Planning and Up-front Consulting	<ul style="list-style-type: none"> Assistance with getting started, developing a model, and an approach to future scenarios Brief regular check-ins to sustain momentum for financial planning and general campaign prep 	8-12 hours \$1,040 to \$1,560
FY 2023-24 Annual Campaign Support	<ul style="list-style-type: none"> Consulting on all aspects of campaign planning, recruiting, communication, monitoring, evaluation Training for visiting stewards 	16-20 hours \$2,080 to \$2,600
Financial Feasibility Study	<ul style="list-style-type: none"> 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 30 one-on-one, in-person interviews with a sample of pledging households, supplemented with some survey data Meet with capital campaign team and conduct informal training for doing major donor asks 	64 hours \$8,320
Capital /Combined Campaign Support	<ul style="list-style-type: none"> Support for campaign planning following the FFS Regular phone/video conferences plus one on-site visit (if possible) to train visiting stewards Review of materials Follow-up lessons learned to strengthen ongoing stewardship 	24-32 hours \$3,120 to \$4,160

*Note: Travel expenses not included in the above



Final Thoughts...

- The process is incremental: a leap of faith but not off a cliff
- Recognize that there is much to be done to define the project, engage the congregation, strengthen annual pledging, and address historic preservation issues. This will all take time, a good thing as we emerge from this year of trauma and pandemic
- Define a project that has broad appeal, furthers your mission, and is affordable
- Educate members about capital campaigns, the kinds of gifts that will be required, and where they can find the money
- Involve as many people as possible, go beyond “the usual suspects”
- As Church leaders, you must be committed, visible, vocal, and generous supporters
- Be reminded of the special characteristics and strengths of First Parish Brewster (Slides 9 and 13)
- Trust is critical – trust your leaders, trust the process, trust each other to rise to the occasion



Appendix (Separate File)

Worship Service Homily

