

Improving Stewardship Outcomes in UU Congregations

May 2021

Introduction

For most UU Congregations, fundraising to support the annual budget is a BIG Challenge. We wanted to understand more about how our congregations approach this work, and what they find helpful to their success.

To identify activities to improve fundraising outcomes, the UUA worked with members of the First Unitarian Universalist Church of Austin to conduct a survey about congregational stewardship. The survey invitation was sent to all UU congregations with at least 100 members.

166 congregations responded to the survey (a healthy 34% response rate). We are very grateful for the time and insight that respondents shared with us and with our wider faith. Thank you.

In most cases, the survey was completed by the Stewardship Campaign chair or a religious professional, and the results reflect their perceptions of stewardship in their congregation.

We will summarize the survey results in four papers and an appendix on methodology:

1. This first paper identifies key factors and activities that have led to successful stewardship outcomes.
2. The second paper will provide more detail on communications methods used in successful stewardship campaigns, including communications channels and messaging.
3. The third paper will focus specifically on ideas for stewardship during the COVID-19 pandemic.
4. The fourth paper will address other stewardship activities – including legacy giving, capital campaigns, auctions, and effective use of consultants and other resources.
5. The Appendix will provide more details on the methodology and statistical analysis.

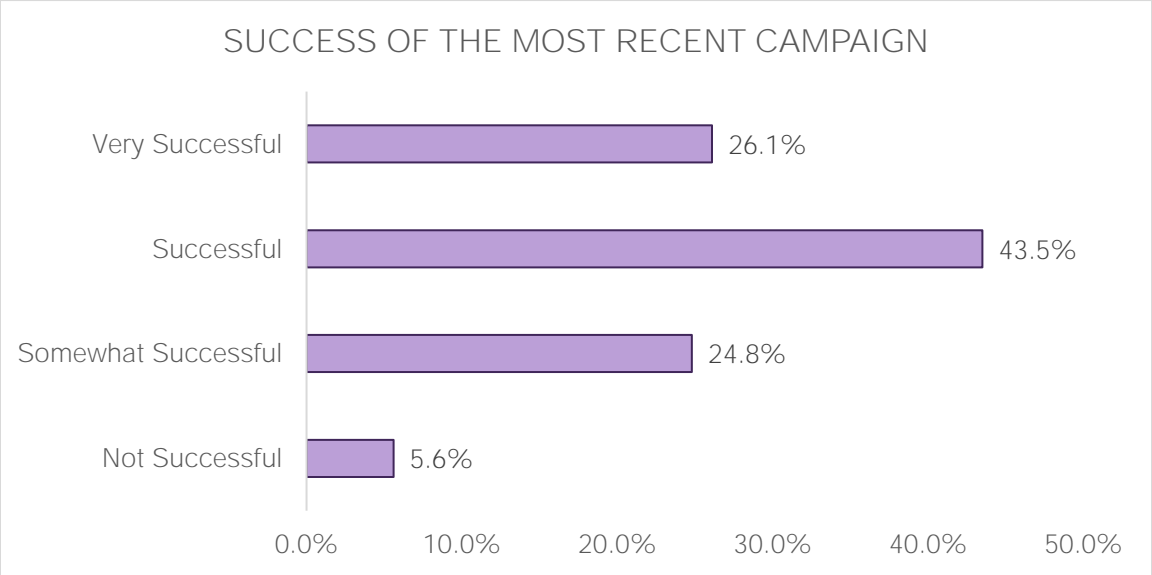
Paper #1: Activities and Factors that led to Successful Stewardship Outcomes

Overview of Stewardship Campaigns

All but one of the 166 survey respondents indicated that their congregations have an annual stewardship campaign to fund their operating budget. The one respondent who said their congregation did not have an annual campaign later indicated elsewhere in the survey that they do have a year-round process for pledging, demonstrating the widespread importance of member pledges to congregational budgets.

A. How successful do respondents view their most recent campaign?

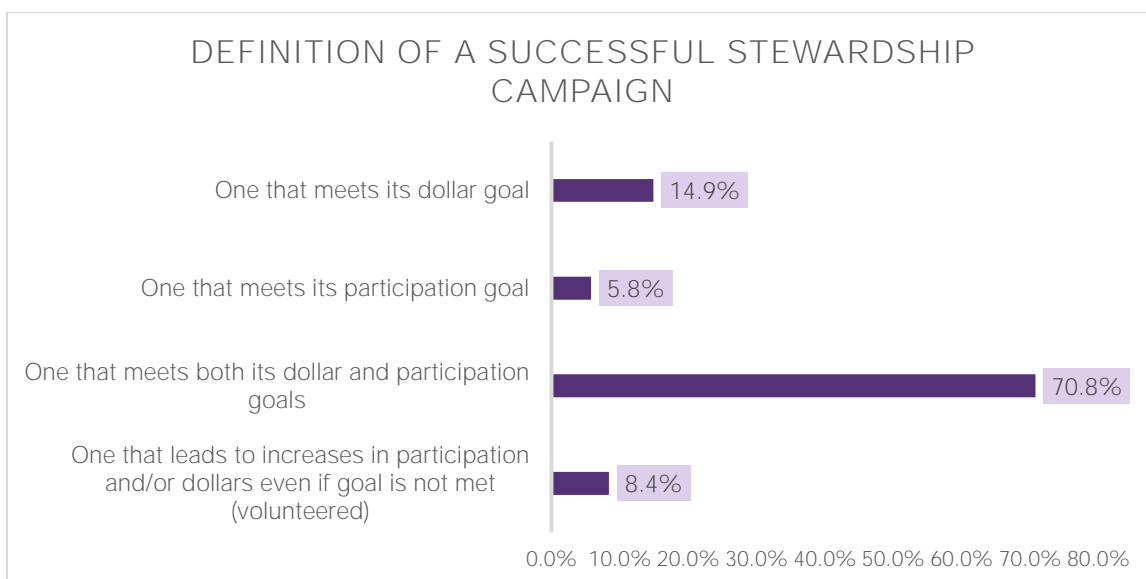
Over 2/3 of respondents (70%) view their most recent stewardship campaign as either “Successful” or “Very Successful”. Only 6% felt their campaign was “Not Successful”.



We asked respondents open ended questions about what factors contributed to their campaign’s success or lack of success. These responses are summarized in the “Effective practices” section below.

B. How do the survey respondents define success?

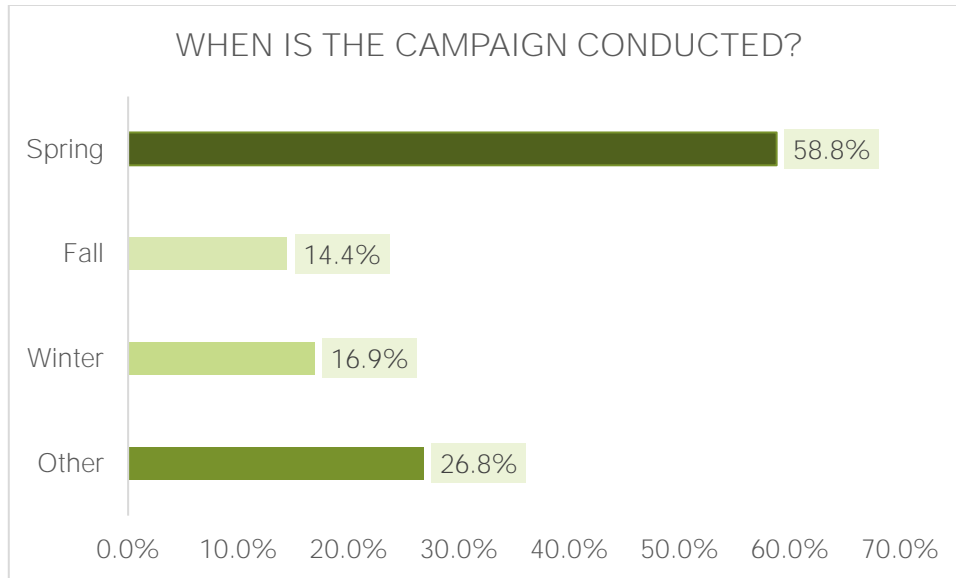
Success can be defined in many ways. The most common are whether the campaign met its dollar goal, its participation goal, or both. 71% of respondents indicated that they define success as meeting both the dollar and participation goals for the campaign.



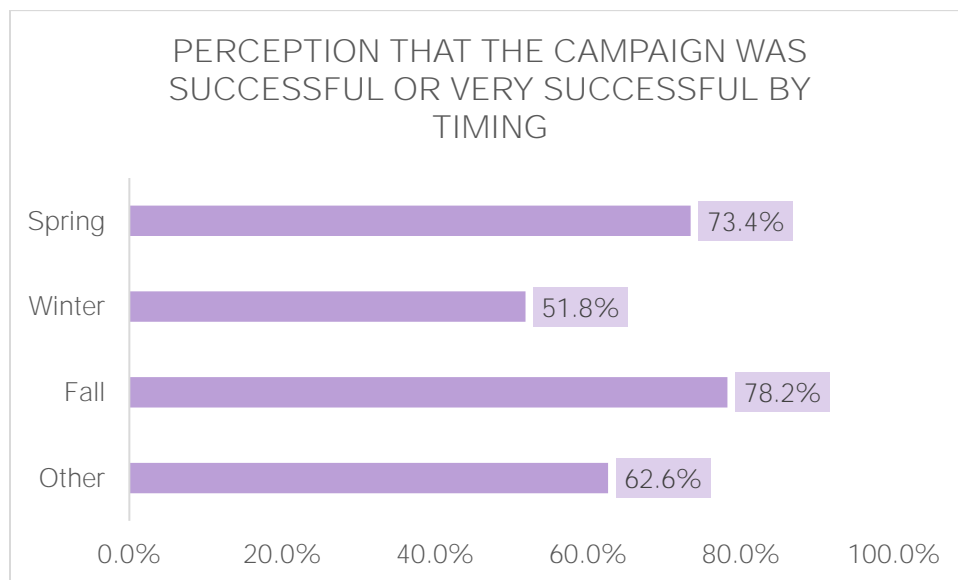
C. When are campaigns conducted and how does that affect success?

Most stewardship campaigns occur in the Spring. Fall and Winter together account for only about 30% of campaigns. 10% of respondents (16 congregations) indicated their campaigns occurred at different times – including 5 congregations who indicated their campaigns occur in “late winter/early spring” and 4 congregations who responded “year round”.

We found that timing of the annual campaign doesn't vary significantly by congregation size or region.



Timing of campaigns does not appear to have a major effect on perceived success of the campaign, although Winter campaigns appear to be somewhat more challenging than Spring or Fall.

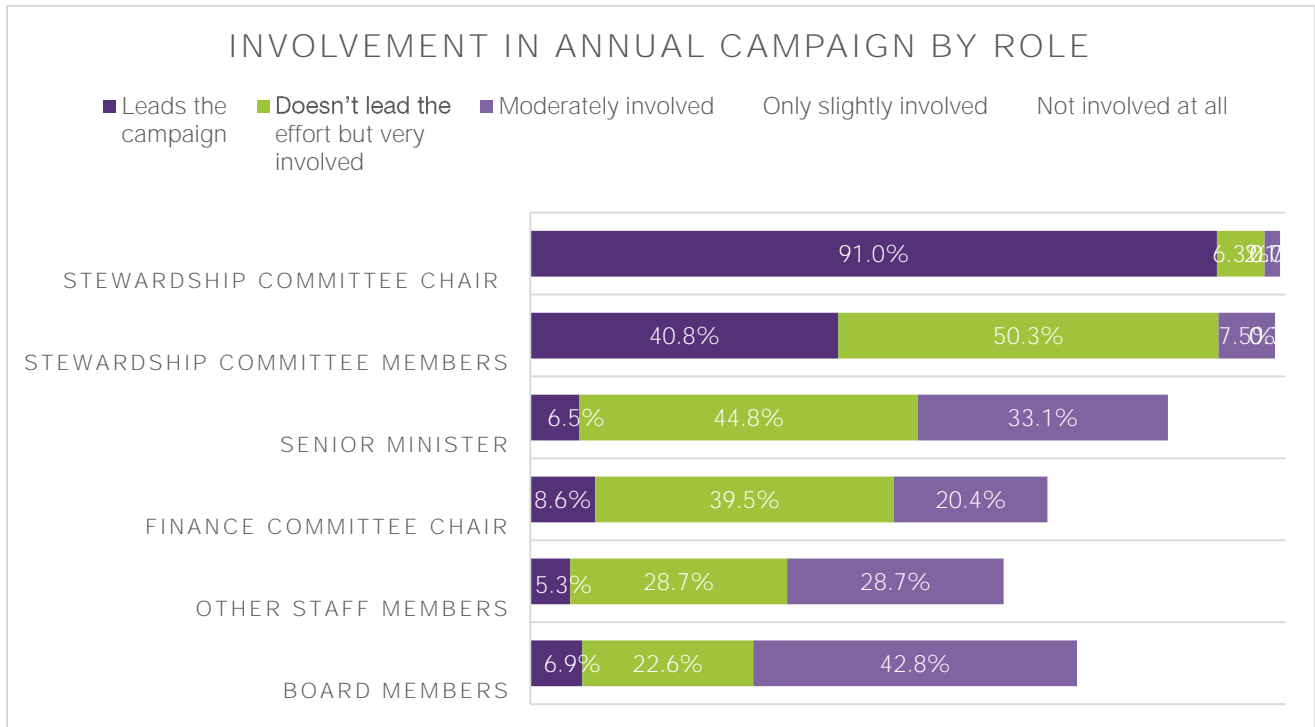


It should be noted that Spring campaigns were most likely affected by COVID-19 (the question was “how successful was your most recent campaign”, and the survey was conducted in the summer of 2020). COVID-19 would not have been a factor in Fall campaigns and would have only affected the final days of Winter campaigns. **Despite this, 73% of Spring campaigns were rated as “Successful” or “Very Successful”.** Respondents provided ideas for dealing with COVID-19, and this will be discussed in our third paper.

D. Who is involved in the stewardship campaign?

The Stewardship Committee Chair was identified by 91% of respondents as leading the campaign. The Senior Minister is at least “Moderately Involved” in 84% of congregations.

Staff other than the senior minister are more likely to be involved in the annual campaign at large¹ and very large congregations. 49% of very large and 41% of large congregations indicated that staff lead or are very involved in their campaigns versus 20% of medium congregations. On the other hand, the Finance Committee chair takes a larger role in the campaign at smaller congregations. 56% of medium and 52% of large congregations indicated that the finance chair leads or is very involved in their campaigns versus 29% of very large congregations.



Survey results found strong leadership and Senior Minister involvement are key factors in successful campaigns. 68% of congregations whose senior minister led or was very involved in the annual campaign were somewhat more likely than others to say “Very Successful”, as did 72% of congregations who were more likely to say their most recent campaign was “Successful”.

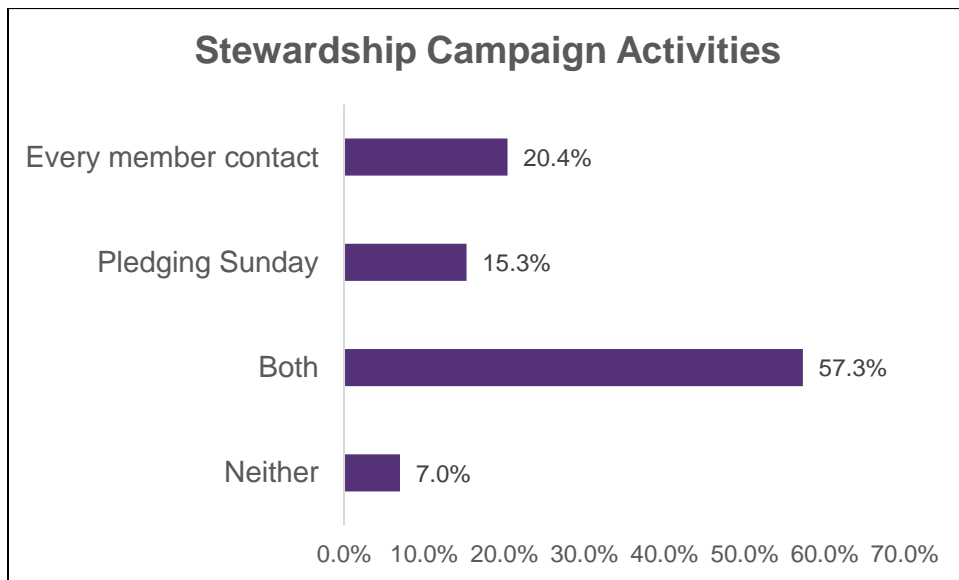
¹ For the purposes of this survey, congregational size categories are based on membership. Medium congregations have 100-199 members, large congregations have 200-299 members, and very large congregations have 300 or more members.

E. How effective are every-member contact and Pledging Sunday in campaigns?

More than half of congregations (57%) use both an every-member contact (some form of direct outreach to members) and a Pledging Sunday (a specific Sunday devoted to Stewardship, on which all members are encouraged to turn in their pledges, often called “Celebration Sunday”) in their campaigns.

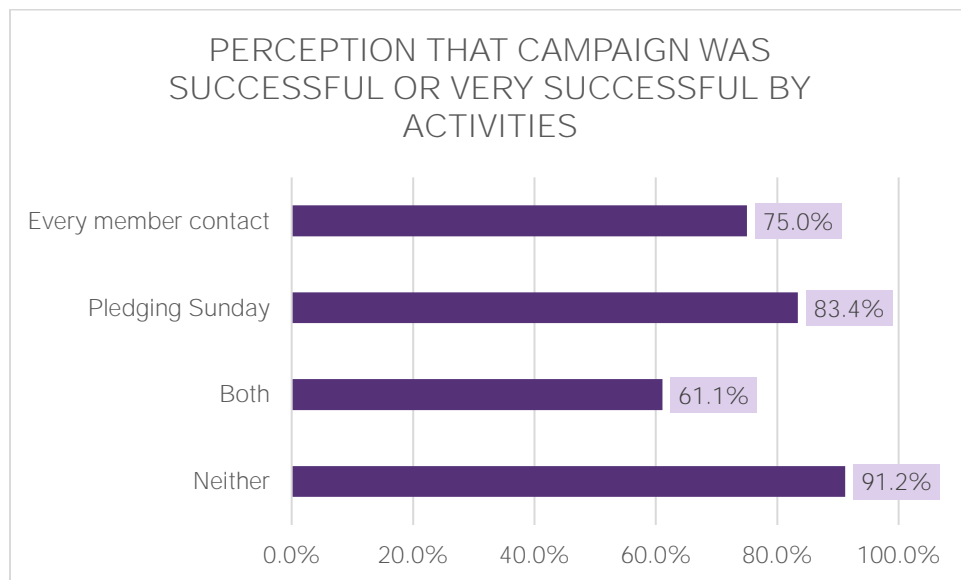
About three-fourths of congregations use at least one of these methods. 78% of congregations use some form of Every Member Contact, 73% hold a Pledging Sunday event, and many use both approaches. Only 7% of congregations use neither of these activities.

Also, congregations that had attended a UUA stewardship training in the past year were more likely to have Pledging Sundays (81% vs 60%), suggesting that this approach to stewardship is, to some extent, being transmitted through involvement with the UUA.



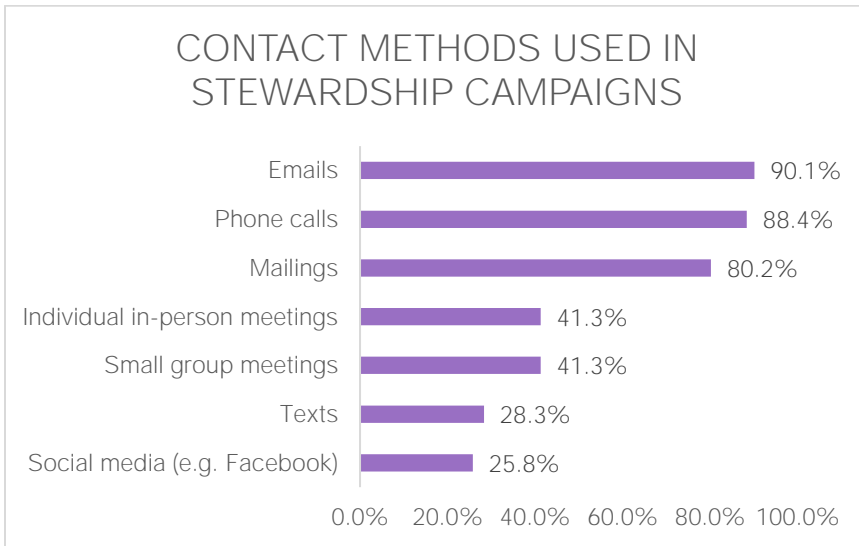
The relationship between activities and perceived success was different from what we expected. Specifically, congregations who used both methods were **the least likely to say that their campaign was “Successful” or “Very Successful”**.

Overall, 70% of congregations rated their campaigns as successful or very successful, but only 61% of congregations that used both Every Member Contact and Pledging Sundays felt this way. We believe this may be because the congregations facing the greatest challenges in fundraising are the most likely to use both activities. Those congregations who ONLY do Pledging Sundays feel their campaigns were more successful than those who do only Every Member contact.

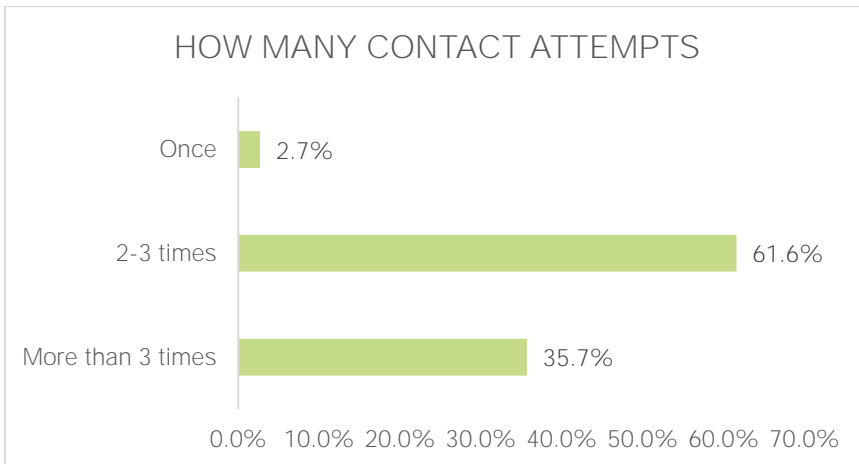


F. How are members contacted during an every-member contact campaign?

In those congregations that make an effort to contact every member during their stewardship campaign, emails and phone calls are the most common communication channels, used by about 90% of congregations. In-person and small group meetings are used in about 40% of cases, although this may have been affected by COVID19.



Most stewardship campaigns involve multiple contacts. In over 1/3 of congregations, three or more contacts are made if necessary. As noted in the Effective practices section below, “good follow up mechanisms” are identified as a key factor in making a stewardship campaign successful.



Effective Practices

Survey respondents who rated their campaign as “Successful” or “Very Successful” were asked to identify the factors that they believe contributed to their campaign’s success.

This was an open-ended question, and many respondents provided detailed descriptions of programs or initiatives that contributed to success. However, most of the factors fell into a few broad categories.

In order of frequency mentioned, the most common factors contributing to stewardship campaign success are:

- a. Compelling messaging
- b. Strong stewardship team leadership
- c. Good follow-up mechanisms to get pledges turned in
- d. Strong leadership from the minister(s)
- e. Thorough visitation programs (often not directly related to stewardship, but instead to strengthen the connection between the church and members)
- f. **An effective “Celebration Sunday” event in which members are encouraged to submit their pledges.**

Exhibit I contains specific comments illustrating the above factors in more detail. Exhibit II contains other ideas and learnings identified by respondents which led to successful stewardship outcomes.

For respondents who indicated their campaigns were less than successful, we asked what factors they believe led to their lack of success. Not surprisingly, COVID-19 was by far the most commonly mentioned factor. COVID-19 was impactful for two distinct reasons: it affected how the campaign was conducted, and it affected how members felt about their financial situation and their ability to pledge.

In our third paper, we will deal specifically with ideas for conducting successful stewardship campaigns during COVID-19.

For questions about anything in the paper, please feel welcome to contact the Annual Program Fund office of the UUA apf@uua.org

Exhibit I- Success Factors

The comments below come directly from congregations who rated their campaigns “Very Successful” or Successful”. These are the verbatim responses to the question “What made your campaign successful?”

Effective practices

A. Compelling Messaging

- We focused our language on generosity of giving and that giving is not just about financial giving. This was a first step in expanding our congregations view of stewardship.
- People responded very favorably to "if everyone gives as they are able, we will have what we need" and over half of households increased their pledge compared to last year.
- Having stewardship-themed testimonials monthly all year and weekly in March during the pledge drive.
- We emphasized the importance of participation, the value of EVERY gift, no matter the size.
- We emphasized all the positive things going on at our church instead of emphasizing our financial stresses.
- We created about 9 "Stewardship Moment" videos in which leaders of various church activities and people of groups that utilize our church space for their social service activities spoke of their joy in their activities and their gratitude for the space provided as a community service.
- Emphasize the positive things your church does for its members and the community rather than emphasize the financial difficulty the church might be in.
- Stress UU Values and principles, include everyone, have fun activities that everyone can participate.
- It's about the mission, vision, and what can be done as a result of fundraising. Making it about the money and the bills doesn't motivate people.
- You have to message in as many ways as possible as many times as possible for as short of time as possible.
- Stress the wonderful things we can accomplish with sufficient funds and how we can better live into our mission and vision. Do not stress how much it costs to keep the building and staff operational although mention those.

B. Strong Team Leaders

- Heavily engaged volunteer leadership.
- Superb and experienced volunteer leader...Good and sensitive communications from Pledge (Stewardship) Team during drive.
- Strong leadership to promote, monitor and follow-up
- Early and detailed planning, including recruiting a strong campaign committee

C. Good Follow-up to Get Pledges In

- We contacted every member and friend that we could, multiple times/methods, we worked very closely with our data to ensure we didn't miss any opportunities.
- After the initial push, the board split up the names of those who had not participated and contacted them all personally. I think that personal connection motivated folks to move from intention to action in making their pledge.
- There is no doubt about this: you have to remind people many times that the campaign is happening and make it easy for them to reply with a pledge every time (through any of several channels).
- Personalized contact with members of the congregation and extensive follow-up with those who were slow to make their pledges.

D. Strong Leadership from the Minister(s)

- Excellent church leadership by our minister, especially how she seamlessly led the congregation from in sanctuary services to online services when the pandemic hit in mid-March during our annual pledge campaign.
- Teamwork between the minister, stewardship team, admin and finance administrator.
- Committed minister who views this as a very important effort
- Our lead minister provided a lot of support including pulpit announcements every Sunday.

E. Thorough Visitation and Contact with Members

- stayed in contact with our membership through mail, text, email and phone calls. We also kept members informed through our newsletter and through ZOOM during the Sunday service.
- The in person, connecting approach really help.
- Conversations with members about what they like about the church and why they attend is a great way to get people to open their wallets to keep those benefits going.
- **It's important to make sure new members find ways to quickly become involved and feel part of the community.** Equally important is checking in with longer term members; their lives are changing and we must be careful to ensure they feel valued.
- To involve many canvassers to allow for one on one contact. And the contact is all about what our fellowship means to each other, not about increasing annual pledge amounts.
- Put the effort in to get to know folks. Use stewardship as an opportunity for pastoral outreach as well.

F. **Effective "Celebration Sunday" Event**

- We created an engaging fun event where we embedded the Stewardship message including the "ASK" into the event. We invited members to complete their pledges that day. And about 60% did.
- Until a few years ago, we focused on contacting every member of the congregation. This was draining on our volunteers. Our switch to a Celebration Sunday allows our volunteers to contact few people and seems much more efficient.

Exhibit II- Other Learnings from Successful Campaigns

Below are some of the verbatim comments and ideas from congregations who identified their campaigns as "Successful". While the concepts and comments in Exhibit I appear with greater frequency, these suggestions only received a few mentions. We hope these will be useful for congregations who are looking for ideas to strengthen their campaigns.

1. Personal knowledge and connection with members

- One of our Finance Committee people has been doing the job for years and is in touch personally with many donors. He can help direct action based on personal knowledge of a donors circumstances which helps reach new donors and avoiding needless solicitation from donors whose circumstances have changed.

2. Make it about the mission, not the money

- It's about the mission, vision, and what can be done as a result of fundraising. Making it about the money and the bills doesn't motivate people.

3. A diverse campaign team, reflecting the congregation

- Relationships with church members are all-important. We use people of various ages on our campaign team. Those who testify need to come from various constituencies within the church.

4. Keep it new

- You do need to change the approach every few years.
- We find that different people respond to different approaches and everyone responds better to something new.

5. Invest in planning up front

- The more successful campaigns have been those where more time was spent in planning and that had more people involved in on the stewardship team.

6. Provide incentives for getting pledges in early

- Offer chocolate chip cookies as an incentive for early pledging. Really!

7. Handwritten thank you notes

- Personal, hand-written "thank you" notes were a HUGE success! We had more than one donor reach out and increase their pledge because they felt "valued" and "acknowledged" by the church.

8. Use shareable tech like google docs to keep the stewardship team on the same page

- Use Google docs spreadsheet to keep track of pledges and record notes, thank you's sent etc. so all stewardship team can view and update.

9. Move everything on-line

- having an online pledge form to make pledging easy and private since most stewarding will likely continue to be digital. This was the first year we did it, and it was a real lifesaver
- We are working to make it an all year event/process by incorporating more online capabilities. We introduced online giving this year and are in the process of revamping our church website which will have a dedicated giving section with information, forms and links to give.

10. Separate social justice giving

- Developing a generous spirit by showing members of the congregation how generous they already are, increases their generosity. We give away the Sunday offering 100% every Sunday. We have a special social justice fund that folks give to over and above their operating fund - we give away about \$200 per member every year. That's amazing generosity!

11. Build the leadership team

- We have a chair person and a chairperson in training to reduce the feeling of being overwhelmed.

12. Year-round visibility for Stewardship

- For about the last two years, we have added year-round activities under the sponsorship of the Stewardship Team. We sponsor Keep in Touch groups in which facilitators make regular personal contact with families and individuals in the congregation. we also assist people with stewardship of their time and talents by helping to match people with roles that need to be filled to carry out our various ministries. And when we are able to meet in person, we sponsor a Welcome Table in our fellowship hour after Sunday services. We display information about our various ministries and are available at the table to answer questions. The name of our team is the All-Year Stewardship Team

13. Share the budget before the stewardship campaign starts, to clarify the need.

- Had a budget presentation prior to annual meeting which, I think, helped people understand and ask questions, which may have effected some stewardship. Might be good to have this discussion prior to stewardship in the future.

14. Have a strong theme

- **Our campaign theme was "Reaching Deep and Reaching Out. We used hands as an image. All info going out started with this theme quote.**

15. Have a stretch goal

- We also establish a 'needs' budget (minimum) and a 'wants' budget. The latter has stretch goals we really want, like a music director or increased Admin staff support - I believe this helps people feel good about considering increasing their pledge.
- In years past we presented a budget that we thought the congregation would be able to meet. This past year the stewardship committee decided a different approach and presented a ideal budget that met all goals for increases in salaries and providing for all committees. We were presently surprised to discover that our congregation gave more in an attempt to reach this ideal budget. We didn't meet it completely but we came close.

16. Include Youth

- This year we included pledge cards for the children in our congregation to fill out and feel like they were actively a part of the pledge drive. They were well received.

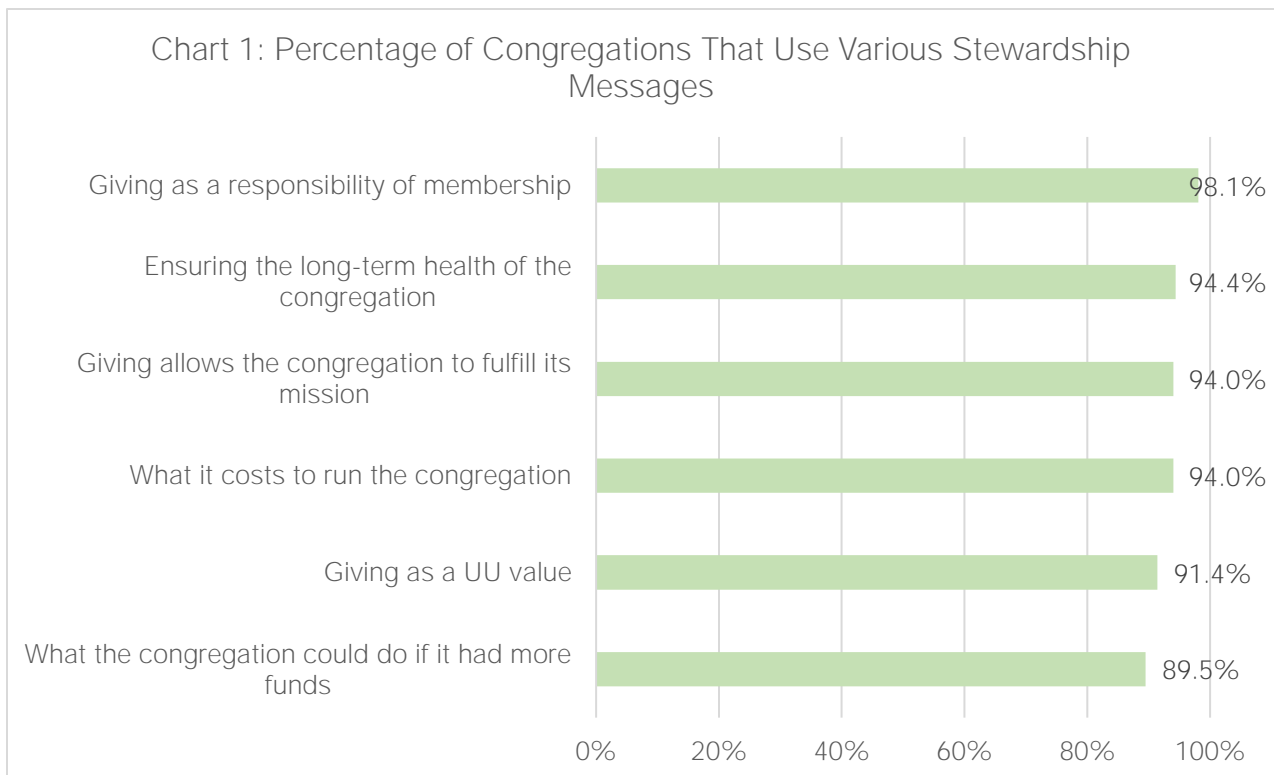
Paper #2: Messaging and Communication

Overview of Stewardship Communications

Paper #1 in this series found that survey respondents who rated their most recent annual stewardship campaign as “Successful” or “Very Successful” identified a number of effective practices that contributed to their success. One of the most frequently mentioned of these practices was compelling messaging, and this paper digs more deeply into this practice by looking at survey response on stewardship messaging and communications channels.

A. What messages do congregations use in their stewardship campaigns?

Survey respondents were asked which messages they use during their annual stewardship campaigns, and of the messages they use, which are most effective. Chart 1 shows the messages most commonly used by congregations.



The only message listed on the survey that was not used by a substantial majority of congregations was the availability of matching gifts, with only 46% of congregations indicating that they use this message. However, this response varied significantly by

congregation size, with 51% of very large congregations, 44% of large congregations, and 35% of medium congregations indicating that they use the message.²

In addition, a number of respondents noted in the “other” response to this question, as well as in responses to a question about what made their recent stewardship campaign a success, that they believe an important stewardship message is that we each give what we can and no gift is too small or unimportant. The quotes below give various examples of this message.

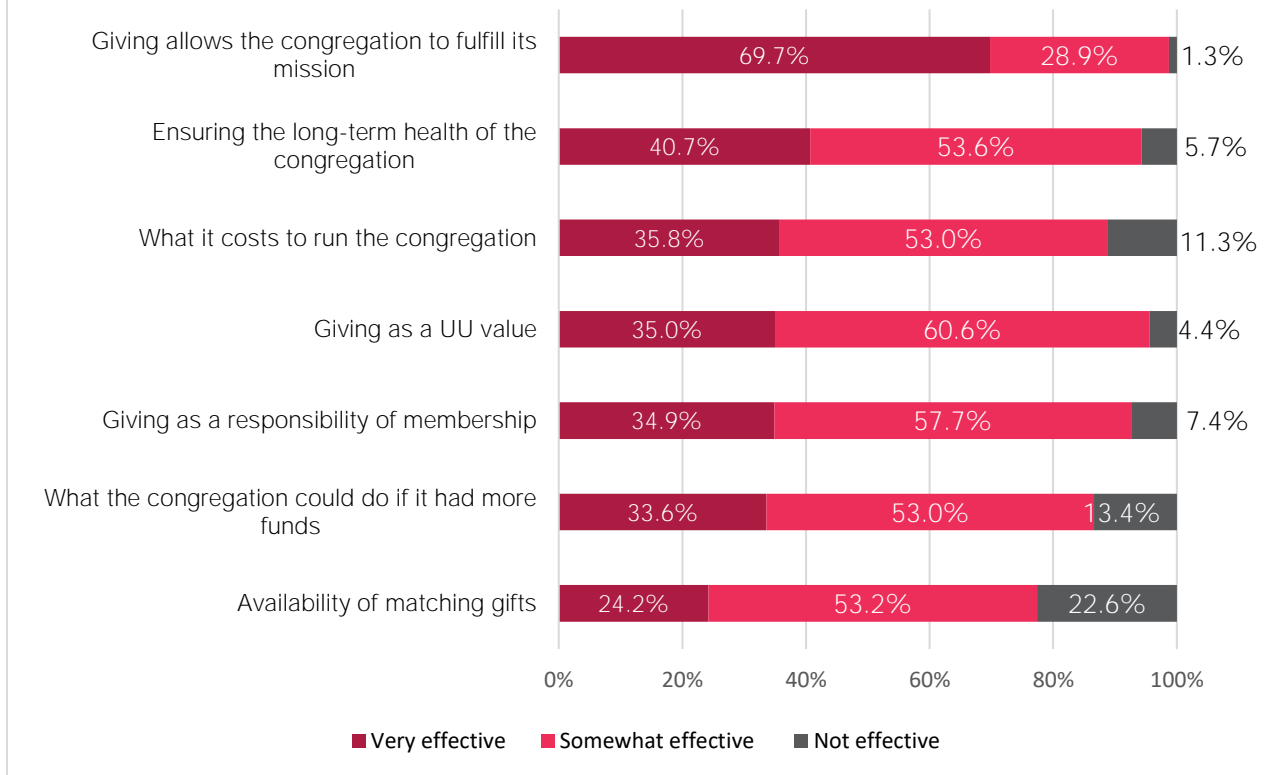
- “Every gift matters.”
- “Give more if you can, less if you can’t (our covid message).”
- “Proportional giving - we each give what we are able”
- “People responded very favorably to ‘if everyone gives as they are able, we will have what we need.’
- “We emphasized the importance of participation, the value of EVERY gift, no matter the size.”

B. Which stewardship messages do congregations see as most effective?

In terms of effectiveness, survey respondents clearly indicated that they see the most effective message, among those listed on the survey, to be that giving allows the congregation to fulfill its mission, with 70% of respondents whose congregations use this message calling it very effective. As Chart 2 shows, 34-41% of respondents see the other messages listed as very effective, with the exception of the availability of matching gifts, which is seen as effective by only 24% of congregations that use that message.

² Very large congregations are defined as those with 300 or more members. Large congregations have 200-299 members, and medium congregations have 100-199 members. Small congregations with fewer than 100 members were not included in the survey population.

Chart 2: Perceived Effectiveness of Different Stewardship Messages



As noted in paper #1, compelling messaging was one of the practices cited as important by survey respondents who rated their most recent annual stewardship campaign as “Successful” or “Very Successful.” A number of the comments respondents made on this topic reflect the idea, noted above, that talking about how giving allows the congregation to fulfill its mission is the most effective stewardship message.

The quotes below help to illustrate this finding:

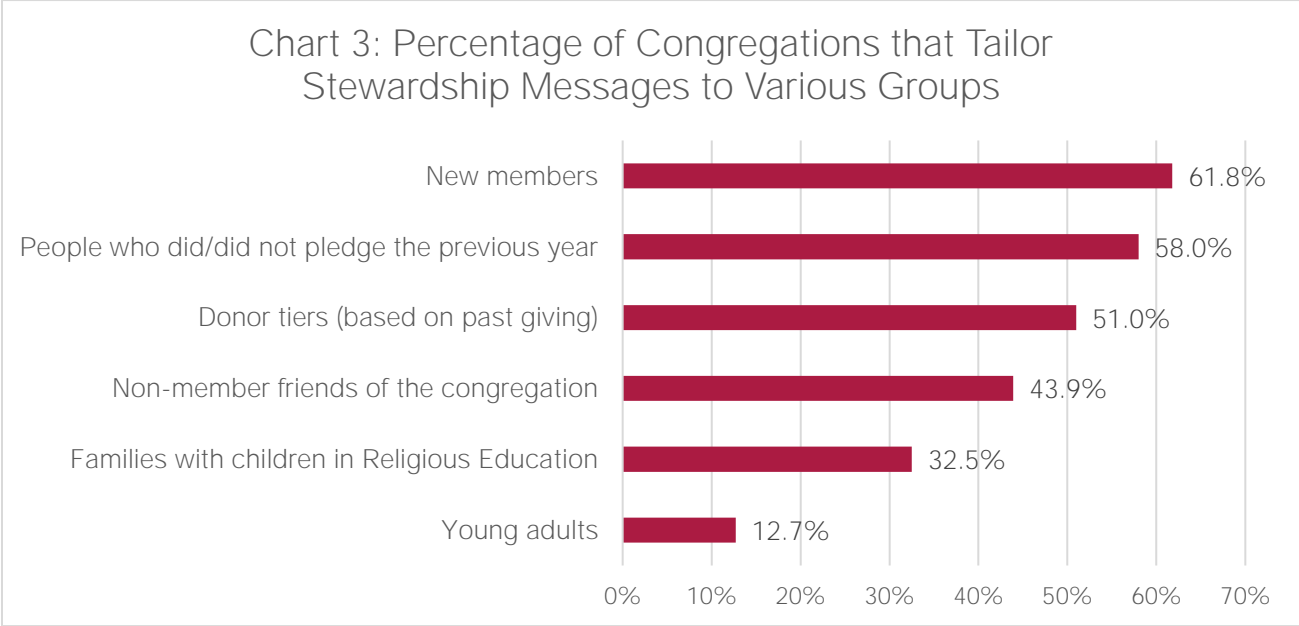
- “We emphasized all the positive things going on at our church instead of emphasizing our financial stresses.”
- “Emphasize the positive things your church does for its members and the community rather than emphasize the financial difficulty the church might be in.”
- “Stress the wonderful things we can accomplish with sufficient funds and how we can better live into our mission and vision. Do not stress how much it costs to keep the building and staff operational although mention those. “
- “It’s about the mission, vision, and what can be done as a result of fundraising. Making it about the money and the bills doesn’t motivate people.”

C. Do congregations tailor their messaging to different groups?

A substantial majority of survey respondents (83%) indicated that their congregations do tailor the stewardship messages they use when reaching out to different groups within the congregation. This practice was more common in larger congregations, with 93% of very large congregations, 83% of large congregations, and 77% of medium congregations making some effort to tailor stewardship messages.

In addition, 95% of congregations that had participated in a UUA regional stewardship training in the last two years use tailored messaging, compared with 77% of those that had not attended such a training, suggesting that the training offered by UUA regions may be encouraging congregations to expand their repertoire of stewardship communications practices.

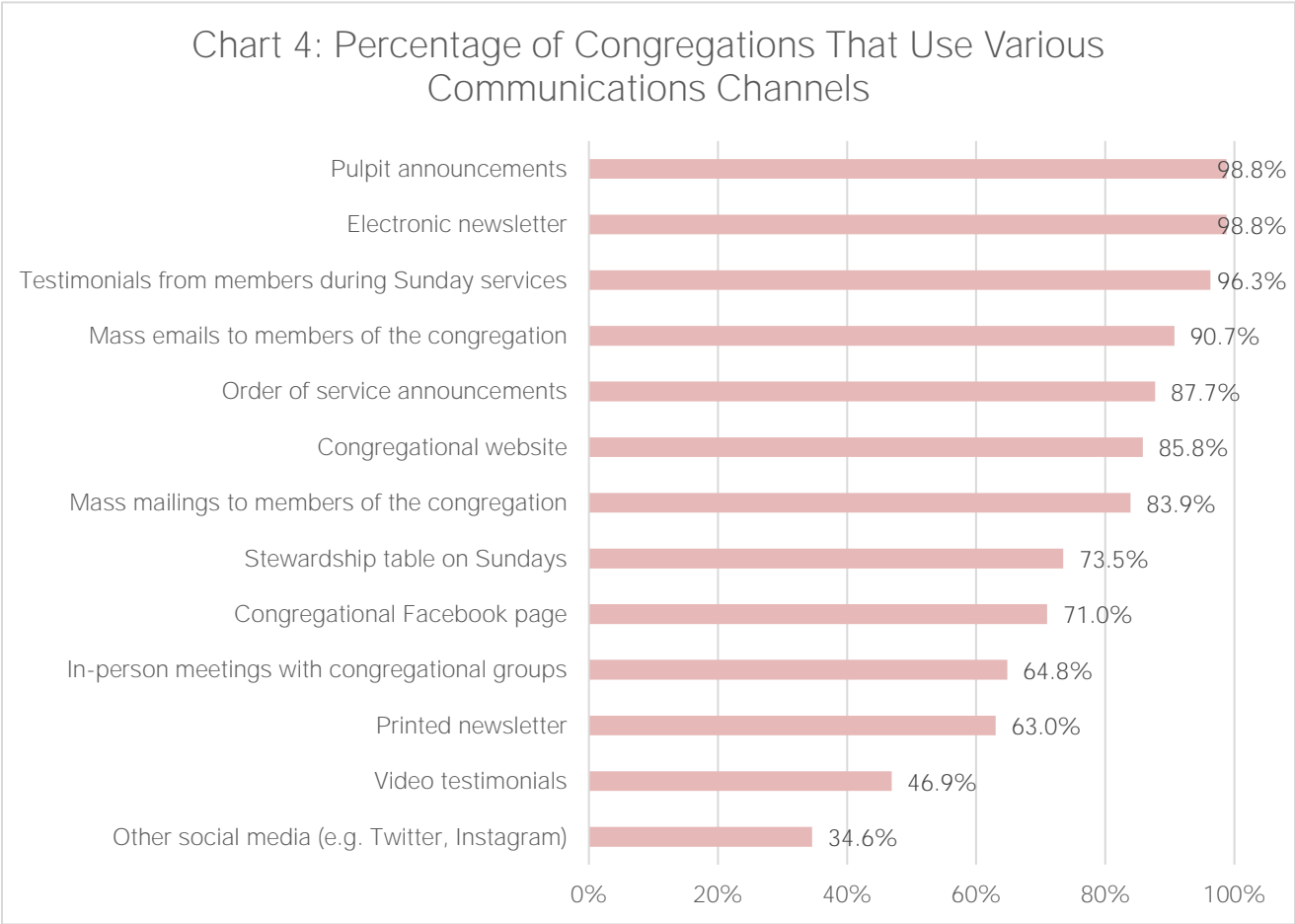
Among congregations that do tailor their messaging, the most common groups targeted for tailored outreach are new members and individuals who did or did not pledge the previous year (see Chart 3). Of the possible groups listed on the survey, young adults were the group least often targeted with tailored messaging.



Very large congregations were considerably more likely than their smaller counterparts to tailor messaging to people who did or did not give the past year, people in different donor tiers (based on past giving), and families with children in Religious Education, a finding that makes sense given the challenge of making connections with members in congregations with larger memberships.

D. What communications channels do congregations use in their stewardship campaigns?

As with messages, survey respondents were asked about their use of and the perceived effectiveness of various communications channels. As Chart 4 shows, congregations use a wide range of communications channels to reach their members. The most common channels, used by more than 90% of respondents were pulpit announcements, electronic newsletters, testimonials during Sunday services, and mass emails to members of the congregations. The only communications channels listed that were used by fewer than half of the responding congregations were video testimonials and social media other than a congregational Facebook page.



The use of some communications channels varied considerably by congregational size. Both very large and large congregations were more likely than medium ones to use the communications channels shown in Table 1.

Table 1: Use of Certain Communications Channels by Congregational Size

Channel	Very Large/Large Congregations	Medium Congregations
Stewardship tables at Sunday services	91%	49%
Congregational website	91%	77%
In-person meetings with congregational groups	70%	51%

In addition, only very large congregations tend to use video testimonials—65% of very large congregations used such testimonials, compared to only 34% of large and medium congregations.

E. Which communications channels do congregations find most effective?

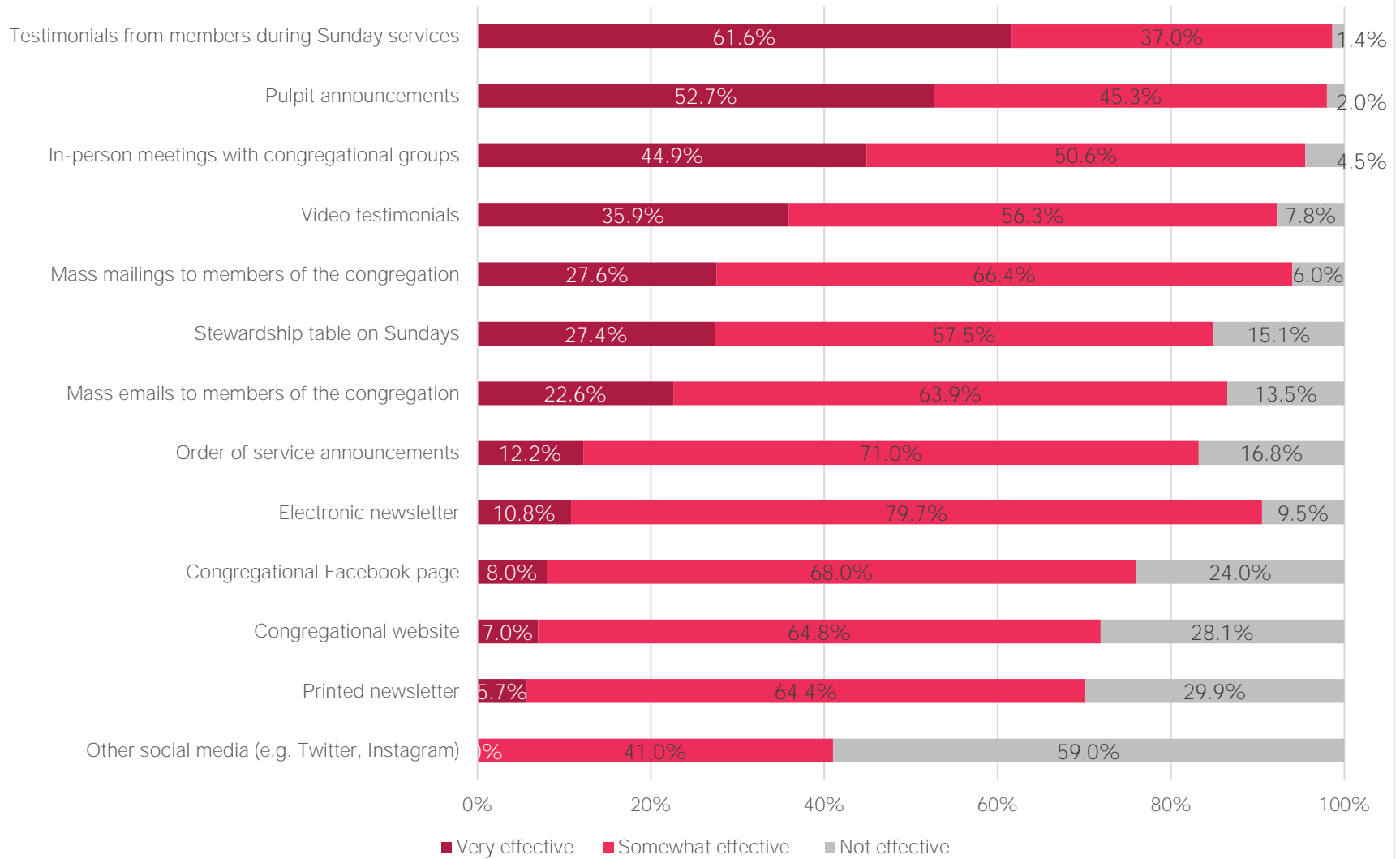
As can be seen in Chart 5 (on the next page), survey respondents found many communications channels to be somewhat effective, but only testimonials from members during Sunday services and announcements from the pulpit were considered very effective by more than half of the responding congregations. Well over half of respondents felt that using social media other than a congregational Facebook page is not effective (in addition to the many congregations who indicated that they do not use this communications channel). Several respondents commented that it can be hard to judge the effectiveness of different communications channels while other noted that it's important to try to reach members in a variety of ways.

Effective Practices

Some of the communication techniques seen by responding congregations as particularly effective include:

- Using a range of different messages and communications channels to reach members of the congregation, with member testimonials and pulpit announcements seen as the most effective communications channels;
- Focusing on positive messaging, with an emphasis on how contributions help the congregation achieve its mission rather than on the congregation's financial needs or difficulties; and
- Emphasizing the importance of all contributions, no matter how large or small.

Chart 5: Perceived Effectiveness of Different Communications Channels



Paper #3: Stewardship during COVID-19

Effect of COVID-19 on Stewardship

As noted in our first paper, 70% of survey respondents rated their most recent Stewardship campaign as “Successful” or “Very Successful”. 24.8% considered their most recent campaign to be “Somewhat Successful”, and 5.6% rated their most recent campaign “Not Successful.”

For the 30% of respondents in the last two groups (who indicated their campaigns were less than successful) we asked what factors they believe led to their lack of success. Not surprisingly, COVID-19 was the most commonly mentioned factor by far.

COVID-19 was described as impactful for two distinct reasons:

- it affected how the campaign was conducted, and
- it affected how members felt about their financial situation and their ability to pledge.

Of the 50 congregations who considered their most recent stewardship campaign to be less than successful, 29 mentioned the effect of COVID-19 on how the campaign was conducted, and 12 mentioned the effect of COVID-19 on their members’ ability to contribute.

Ideas for Stewardship During COVID-19

We asked congregations for ideas to overcome the COVID-19 barrier to stewardship effectiveness. 92 of the survey respondents provided answers to this question, although in many cases they just indicated that they are still trying to figure it out.

Still, many useful ideas were identified. The most common were:

1. Emphasize connection – recognizing that COVID has created huge challenges for many members and friends, churches are making a bigger effort to reach out and connect.

2. Switch to an entirely virtual (i.e. on-line) campaign – use video conferencing, testimonials during on-line services, and phone or email for person-to-person connections. Some congregations are finding that virtual contact works better than in-person for some types of communication (for example, more opportunity to connect with new members).
3. Refine messaging – rethinking the campaign theme, in-service messaging and other communications to reflect the COVID environment.
4. Use on-line auctions to augment pledge income - congregations have modified auctions to be low contact or no-contact, and this has helped them fill the funding gap.

Verbatim comments from congregations are included in Exhibit I to provide more detail on these tactics.

In addition to these frequently mentioned factors, congregations identified several ideas that were mentioned by only one or a few congregations but may be helpful. These are listed in Exhibit II.

Exhibit I – Comments related to the ideas mentioned most often

1. Emphasize connection

Stewardship comprises more than fundraising; it must foster human connection and engagement. In this time of isolation from one another, we have been reaching out by email and telephone to all our members and friends.

Before we began the pledge campaign, the church contacted everyone (member & friend) just to check in and see how they were doing. This was a big task that primarily fell to the Pastoral Care team, but Stewardship and others assisted. This built up a great deal of good will, which I believe really help our campaign.

When we shifted to doing worship on Zoom, our Board members still signed up to give a stewardship moment at each service.

Card writing campaign so that all members get a card at some point in the summer.

If we see that someone has not contributed recently, but used to be more regular, we contact them directly and offer support.

2. Switch to an entirely virtual campaign

Our fall Celebration Sunday and stewardship drive will be virtual. We are planning to mail pledge cards to all congregants.

We have adjusted our theme to something that we believe will be better suited to a virtual campaign.

We have expanded ways in which people can contribute electronically to make giving easier, more convenient.

We also did testimonials in worship via Zoom, recorded them, and put them in the eblasts and website (with permission) for those who missed it.

We had to hold 'cottage dinners' as virtual events... We had great participation in the virtual version, and it was a good opportunity to answer questions of newer members and friends of the congregation.

We will be doing all gatherings via Zoom and won't hold a stewardship kickoff dinner. We'll have to do many more one-on-one conversations with members.

We switched from cottage meetings and a bi-annual stewardship dinner to letters primarily with brief pulpit messages and very little direct phone calling.

3. Refine messaging

We encouraged our congregants to do what they could and thought was prudent for them in a difficult decision making time.

We encouraged those that had the flexibility to do more to do so if they were moved to help our mission in this difficult time for all.

If they are facing a financial hardship, we offer to reduce their pledge. We also have been very diligent explaining that we understand that there have been financial difficulties, but no matter what our main purpose is to continue to offer spiritual growth and support no matter what their donation is.

Spent more effort acknowledging people's challenges

4. Use on-line auctions to augment pledge income

We also instituted an online mini-auction that included gift baskets and other donated items that the donors could easily deliver to purchasers' homes.

We did an online Auction ... We were overwhelmed by the generosity of our congregants. We doubled our budgeted income which will hopefully relieve the budget pressure of our fall FAIR that will be cancelled. We plan to use the online tool for other fundraisers. It is called Auctria. Fantastic!

Exhibit II – Other Ideas

These ideas were mentioned once or twice.

1. Saving money on the Stewardship campaign and sharing that information with the congregation

Events like kickoff dinners and in-church celebrations had to be canceled, which was unfortunate, but the silver lining was that the Stewardship budget was not spent. Members appreciated that we were saving the money.

By not hosting the traditional kick-off brunch, we actually saved money and Stewardship came in under their annual budget, which made some pledge units very happy (showing we were being mindful of loss of revenue/income, by reigning in excessive spending.)

2. Surveying the congregation.

We are surveying the congregation through Survey Monkey to find out how the pandemic may have changed some members' connection to the church, **including their financial commitment. ... The responses to our survey** will give us good information about the financial hardships some of our members might be facing and will give us good information about members' commitment and sense of connection to the church in all ways, including financially. Based on these responses, we will tailor our budget and our pledge-season messaging (as well as other activities) accordingly.

3. Thank you notes

Send thank you messages to members who are particularly consistent in their giving to let them know how much we appreciate their continuing that steady support of our congregation.

4. Monthly stewardship-themed testimonials

5. Drive-through event

We plan to do a drive-thru event for the culmination of our Stewardship Fall Campaign. After the online service, instead of fellowship time, we will ask members to drive thru the church to see some "leading" faces and have a "goodie" bag for them. We are also using this as another way members can turn in their pledge forms.

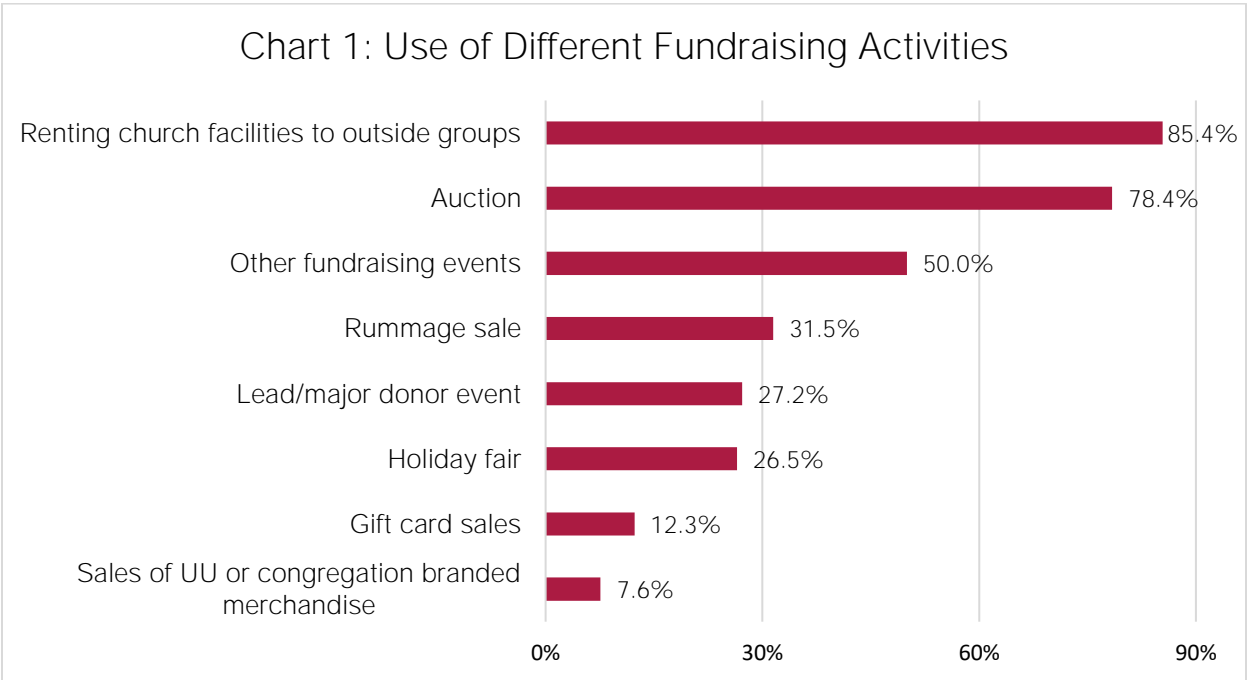
Paper #4: Stewardship Beyond the Annual Campaign

Overview of Stewardship Approaches

As paper #1 in this series noted, all but one of the 166 survey respondents indicated that their congregations have an annual stewardship campaign to fund their operating budget. For many congregations, however, that campaign does not provide enough income to cover their annual operating expenses. Most congregations collect additional funds by passing the plate at Sunday services each week, but many also use a range of different fundraising approaches to meet their financial needs. This paper examines what survey respondents said about such approaches, as well as discussing other stewardship topics such as donor recognition and useful resources.

A. What fundraising activities, other than an annual stewardship campaign, do congregations use?

Survey respondents were asked which fundraising activities their congregations currently use. Chart 1 shows the extent to which certain activities are used by responding congregations.



Note: Gift card sales refer to the opportunity offered to non-profit organizations by some retail chains to purchase gift cards at a discount and then resell them at face value.

The other fundraising activities volunteered by survey respondents included:

- donations based on percentage of member purchases through programs such as Amazon Smile or those sponsored by some retail and restaurant chains.
- raffles of donated items;
- book or plant sales; and
- special events such as a choir concert or dinner with an admission fee.

Larger congregations were more likely to hold special events to recognize lead or major than were their smaller peers, with 36% of very large and 37% of large congregations holding lead donor events versus 15% of medium congregations. On the other hand, medium congregations were more likely to hold rummage sales--42% of medium congregations had such sales compared to only 24% of very large and large congregations.³

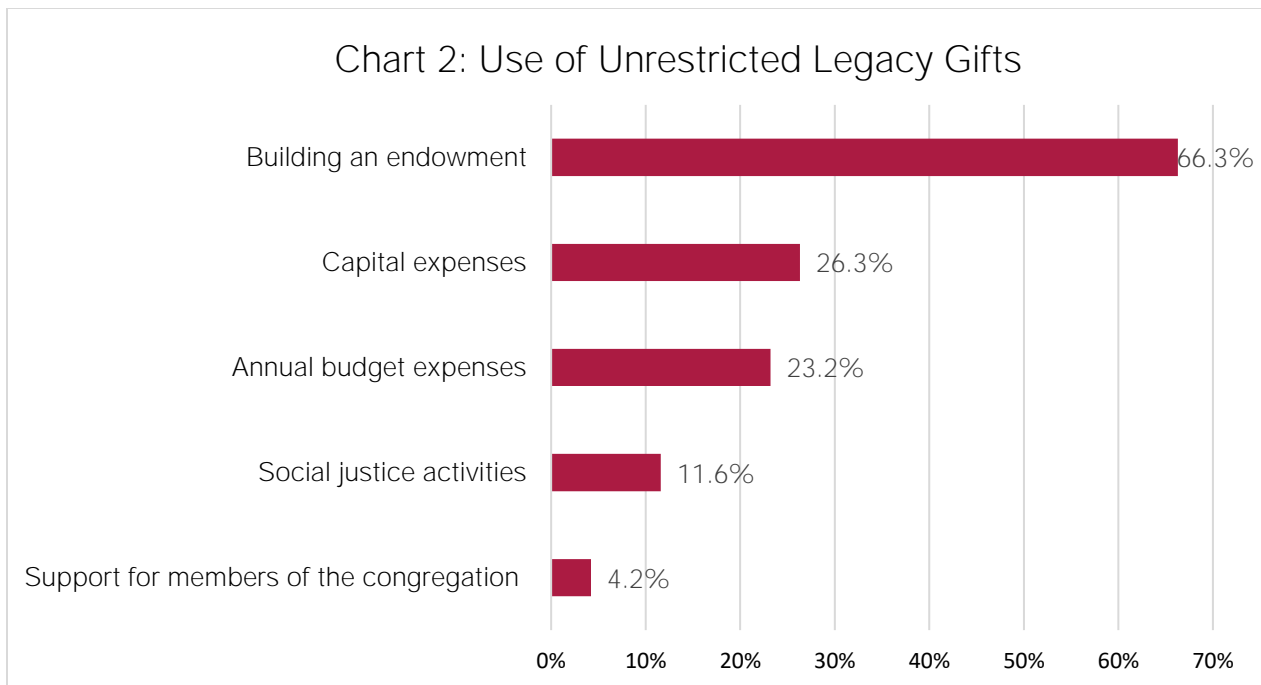
Congregations were also asked if they are currently conducting a capital campaign, an intensive effort to raise funds for a specific purpose such as building renovation or an endowment. Nearly a quarter (23%) of responding congregations indicated that they are currently conducting such a campaign, but this percentage varied by congregational size, with very large congregations the most likely to be conducting capital campaigns.

³ Very large congregations are defined as those with 300 or more members. Large congregations have 200-299 members, and medium congregations have 100-199 members. Small congregations with fewer than 100 members were not included in the survey population.

B. How do congregations handle legacy giving?

Legacy or planned giving in which members designate the congregation as a beneficiary in their wills, retirement plans, or life insurance policies offers congregations an opportunity for sometimes substantial, if irregular, donations. Of the congregations that responded to the survey, 61% have some form of legacy giving program. This practice varied by congregational size, with 79% of very large congregations, 61% of large congregations, and 51% of medium congregations indicating that they have such a program.

Chart 2 shows how congregations with legacy giving programs use legacy gifts if the use is not restricted by donor intent. Building an endowment is, by far, the most common use of bequests, with two-thirds of congregations using funds this way, followed by covering capital and annual operating expenses. Very large congregations were especially likely to indicate that they use legacy gifts for building an endowment, with 82% indicating that they use bequests for this purpose versus 58% of large and medium congregations. Several congregations volunteered that they use bequests for Religious Education programs or for special projects.

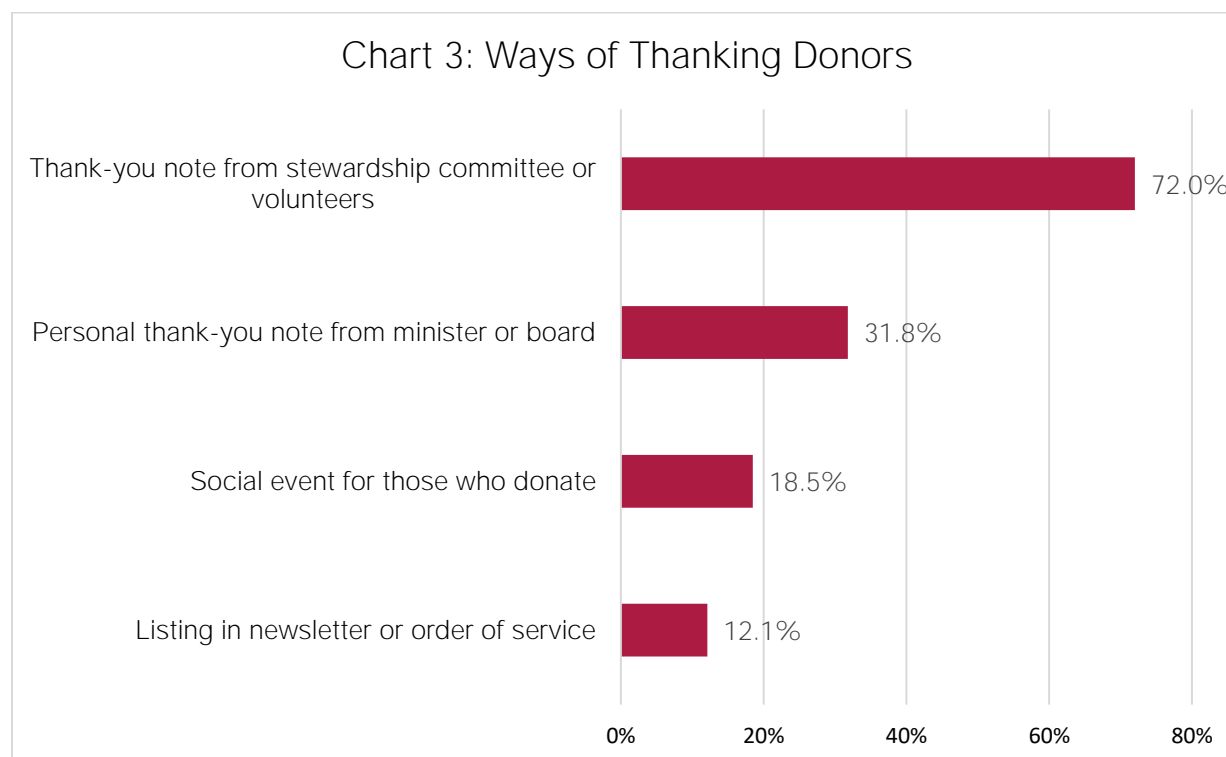


Survey respondents were also asked if their congregation had participated in the UUA's Wake Now Our Vision campaign, in which legacy gifts to congregations and other UU entities were matched with a grant from the UU Congregation at Shelter Rock. More than a quarter of respondents (27%) indicated that their congregation did participate in

this campaign. However, these numbers must be viewed with caution because nearly a third of the respondents (31%) did not know if their congregation participated or not.

C. How do congregations recognize their donors?

Chart 3 shows the extent to which responding congregations use various methods for thanking donors. Nearly three-quarters of congregations (72%) send donors thank-you notes from the stewardship committee or volunteers, by far the most common response.



Several congregations volunteered that they do not thank donors individually but only as a group, such as with a general thank-you published in the order of service or newsletter. Some of these congregations expressed discomfort with the idea of publicly identifying those members who have donated (and, by extension, those who have not). Along similar lines, other congregations noted discomfort with the idea of treating donors differently based on the amount of their pledge and thus prefer to hold a thank-you event for all donors regardless of pledge amount. The key point for both of these groups of congregations seems to be that stewardship is a communal effort and the focus should be on community, rather than individual, participation.

D. What resources do congregations use to improve and expand their stewardship approach?

Survey respondents were asked if their congregations had used various resources in their stewardship work. As Table 1 shows, a relatively small percentage of congregations reported having done so, but these numbers may be inaccurate because of the high percentage of respondents who did not know the answer. The resource most often used, by over a quarter of congregations (27%), was attending a training around stewardship through their UUA region.

Table 1: Use of Stewardship Resources

	% who have used resource	% who have not used resource	% who did not know answer
Attended a stewardship training through their UUA region	25.3%	50.6%	22.7%
Participated in a phone call, webinar, and/or onsite training with the UUA's Legacy Giving office	12.9%	40.9%	46.2%
Contracted with a consultant to work on their annual stewardship campaign	11.1%	79.7%	9.2%

In an open-ended question, respondents were asked if there were any other resources that they had found helpful in their stewardship efforts. The resource most often mentioned (by 30% of those who answered the question) was the institutional wisdom and experience of their congregational members and staff, whether accumulated over years of doing this work or brought to the congregation from external fundraising experience.

Respondents also frequently mentioned the value of learning from other congregations, both UU and other denominations. The quotes below show some of these responses:

- “We learned about the stewardship event that the Bloomington, IN church has done, and then created our own scaled-down version.”
- “[We do] some looking at what other churches do with respect to graphics and talking about pledges.”
- “We like to review ideas from other congregations. For example, we found the Banquet Table service idea on a Methodist website.”

Another commonly mentioned resource was the UUA. Specific examples of UUA resources included the Congregational Fundraising and Stewardship website, *UU World*

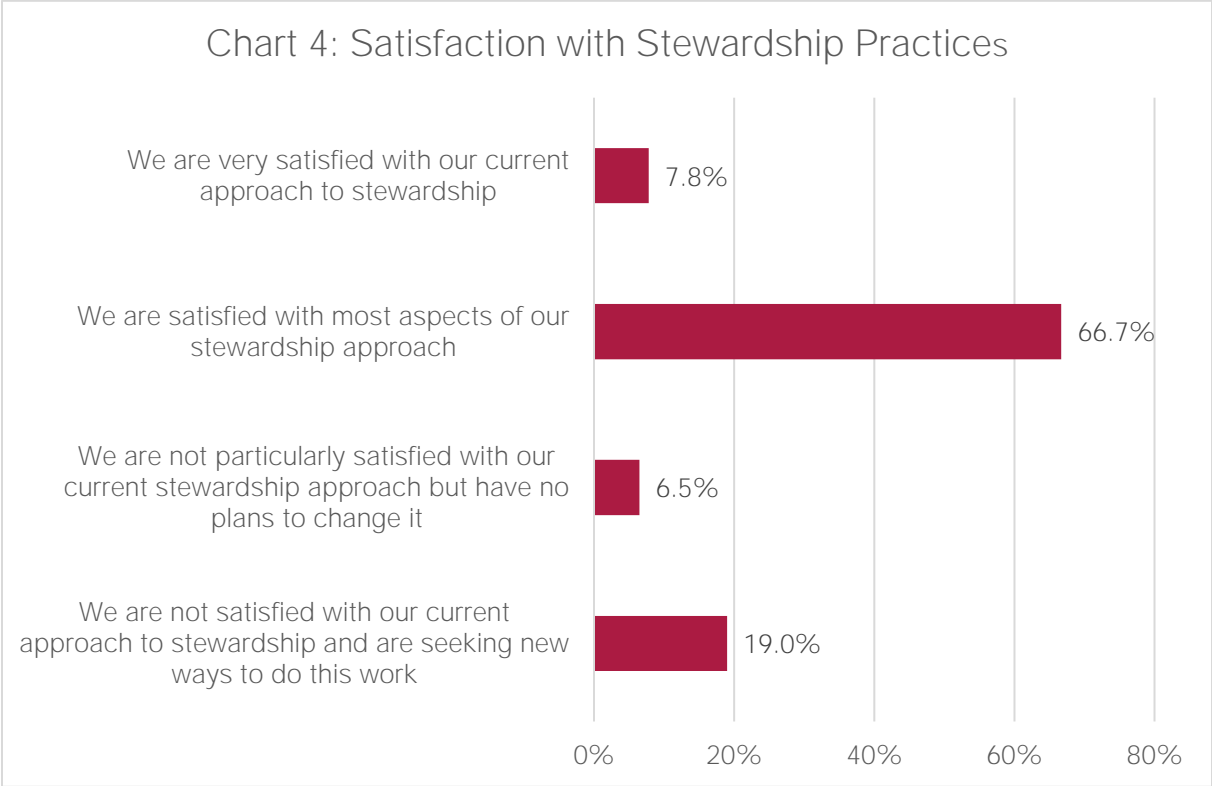
magazine, and the UU-Money email list. Of particular importance for a number of congregations were the blogs, webinars, and General Assembly presentations offered by Stewardship for Us, a UUA-affiliated consulting firm focused on fundraising and stewardship for UU congregations.

Finally, some congregations mentioned a number of books they have found helpful. As one respondent put it, “We are constantly reading and re-reading books on stewardship and church giving.” The specific book mentioned most often was *Beyond Fundraising* by Wayne B. Clark, which is the primary recommended resource of the UUA.

Exhibit I (at the end of this paper) includes additional information on the resources mentioned above and others recommended by survey respondents.

E. To what extent are congregations satisfied with their stewardship approach?

Responding congregations were asked about the extent to which they are satisfied with their current stewardship approach, and while only a small percentage indicated that they are very satisfied with their stewardship approach, two-thirds of respondents said that they are mostly satisfied with their approach (see Chart 4).



As can be seen in Table 2, there was some variation in satisfaction levels based on the fundraising and donor appreciation activities in which responding congregations engaged.

Table 2: Satisfaction with Stewardship Practices By Different Types of Activity

Activity	Percentage of those doing activity that are satisfied or very satisfied with stewardship practices	Percentage of those not doing activity that are satisfied or very satisfied with stewardship practices
Lead or major donor events	84%	70%
Auctions	77%	62%
Thank-you notes from stewardship committee or volunteers	78%	66%
Social event for those who donate	86%	72%
Public listing of those who donate	58%	77%

In addition, congregations that had participated in a stewardship training through their UUA region were more likely than those that do not to be satisfied with their stewardship approach, with 78% of those that had attended a training saying that they are very or mostly satisfied versus 71% of those that had not attended a training. A similar, and even more pronounced, pattern can be seen for those congregations that contracted with a consultant to work on their annual stewardship campaign. In that case, 88% of congregations that had contracted with a consultant indicated that they are very or mostly happy with their stewardship practices, compared to 72% of those that had not contracted with a consultant.

Effective Practices

Most responding congregations expressed satisfaction with their current stewardship approach. The general stewardship practices most often adopted by survey respondents included:

- Renting church facilities and/or holding an annual auction to raise additional funds;
- Maintaining an active legacy giving program, funds from which are often used to build up endowment reserves;
- Thanking donors by sending personal notes from the stewardship committee or other volunteers; and
- Using resources from the UUA and other congregations to learn new stewardship techniques.

Exhibit I: Helpful Resources

UUA Resources

Congregational Fundraising and Stewardship Resources

<https://www.uua.org/finance/fundraising>

UU World magazine

<https://www.uuworld.org/>

UU-Money email list

<https://lists.uua.org/mailman/listinfo/uu-money>

Stewardship for Us consulting

<https://stewardshipforus.com/>

Books

Wayne B. Clark

Beyond Fundraising

<https://www.uuabookstore.org/Beyond-Fundraising-P18097.aspx>

J. Clif Christopher

Not Your Parents' Offering Plate: A New Vision for Financial Stewardship

Michael Durrall

Creating Congregations of Generous People

The Almost Church Revitalized: Envisioning the Future of Unitarian Universalism

Lyle E. Schaller

44 Ways to Expand the Financial Base of Your Congregation

Appendix: Survey Methodology

The initial idea for a survey of stewardship practices at UU churches arose in 2019 with the Stewardship Council at the First UU Church of Austin, Texas. In November 2019, David Overton and Wendy Erisman from First UU Austin began to work with Norrie Gall, the Congregational Giving Manager in Stewardship and Development for the Unitarian Universalist Association (UUA), to develop the survey. A pilot version of the survey completed in February 2020 was reviewed by a number of stewardship leaders from UU congregations as well as by Stewardship and Development staff at the UUA. Their feedback was used to revise the survey.

The finalized survey, with an added question about impact of the pandemic, was launched in July 2020. Survey invitations were sent to the Annual Program Fund Contact at 486 UU congregations based in the U.S. that have at least 100 members. The invitations were preceded by an email from Director of Stewardship and Development, the Rev. Lauren Smith, announcing the survey and explaining its importance.. The survey remained open through September 2020, and responses were received from 166 congregations for a response rate of 34.2%. Of the 166 congregations that responded, all but four completed the full survey, and most provided extensive answers to the open-ended questions asked.

Survey responses were matched with congregational data from the UUA's 2020 certification process to provide information on the region, membership, and finances of the responding congregations. These additional data allowed for a comparison between the congregations responding to the survey and the whole population of 486 congregations. Table 1 below shows the median values for the membership and financial data points compared to the median values for the population of congregations.

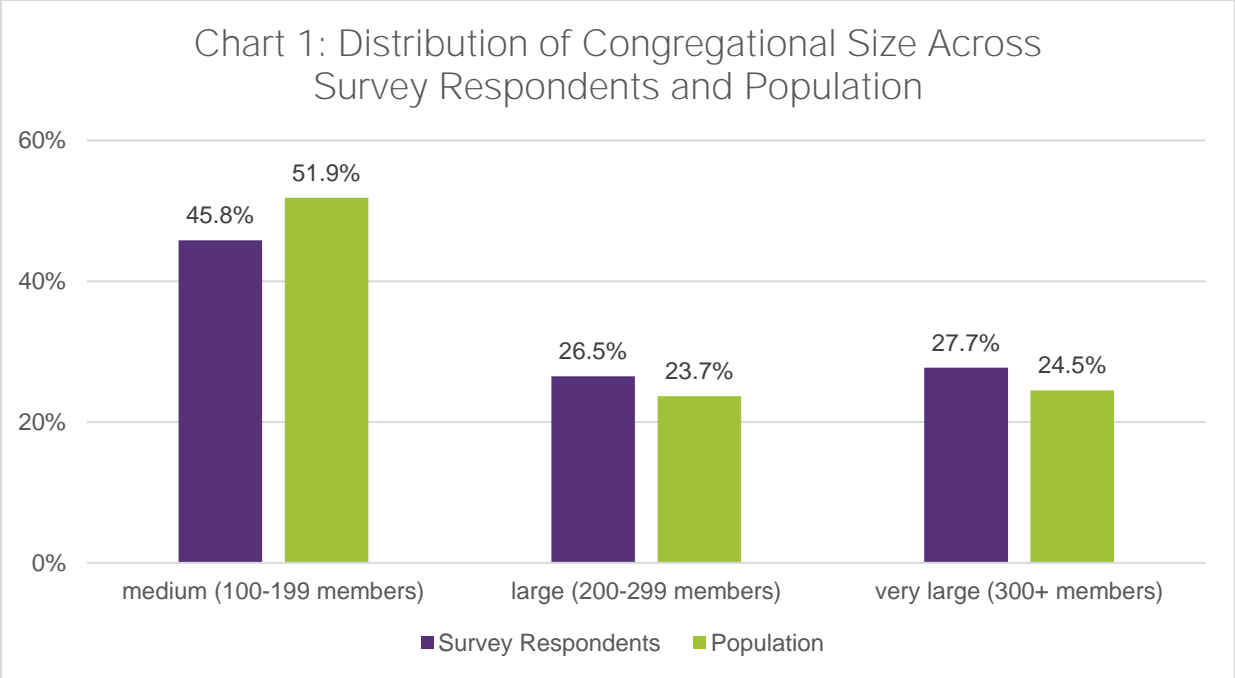
Table 1: Median values of congregational membership and financial data points for survey respondents and population surveyed

	Survey Respondents	Population
UU Members	213	193.5
Pledging Units	137	128.5
Pledging Income	\$259,644	\$238,326
Total Operating Expenditures	\$320,632	\$302,206
Endowment Reserves	\$447,041	\$407,641

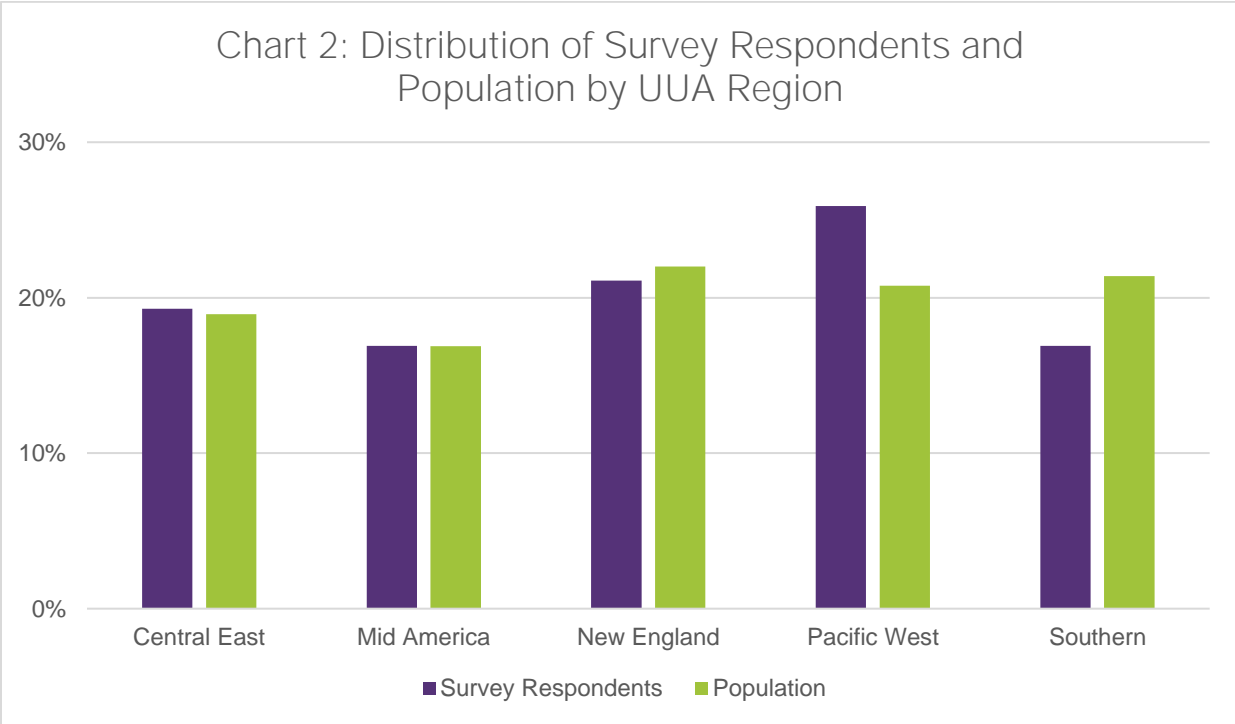
As can be seen in this table, the congregations that responded to the survey had somewhat larger memberships than the population as a whole, as well as somewhat higher operating expenses, pledging income, and endowment reserves. However, these differences are not particularly dramatic.

Looking more closely at congregational size, it can be seen that congregations with 100-199 members are underrepresented among the survey respondents with a corresponding overrepresentation of larger congregations. Chart 1 shows the distribution of congregations across the congregational size categories used in analyzing the survey data.⁴

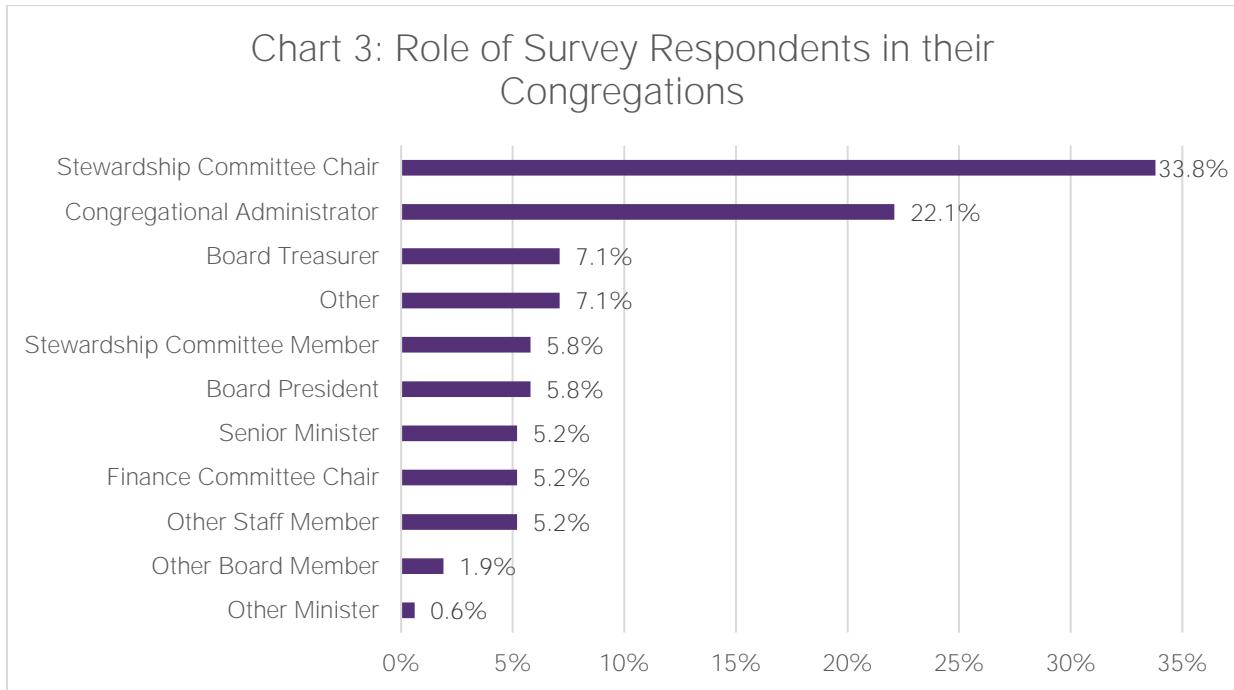
⁴ Size categories were determined based on the number of UU members each congregation reported to the UUA as part of the 2020 certification process.



In terms of UUA region, congregations from the Pacific West were overrepresented while congregations from the Southern region were underrepresented (see Chart 2). As the Southern region has considerably more congregations with 100-199 members than do the other regions, this difference between the survey respondents and the population from which they were drawn is strongly correlated with congregation size. However, the distribution of congregations by size within each region was virtually identical among survey respondents and population.



Survey respondents were asked to provide their role at their congregation, and these roles varied considerably across the congregations that responded, as can be seen in Chart 3.



Who responded to the survey varied by congregational size, with congregational staff more often responding for the largest congregations and stewardship committee members most often for smaller congregations. Board members also responded more often at the smallest congregations (see Chart 4).

