

Improving Stewardship Outcomes in UU Congregations

December 18, 2020

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 (Texas) 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:

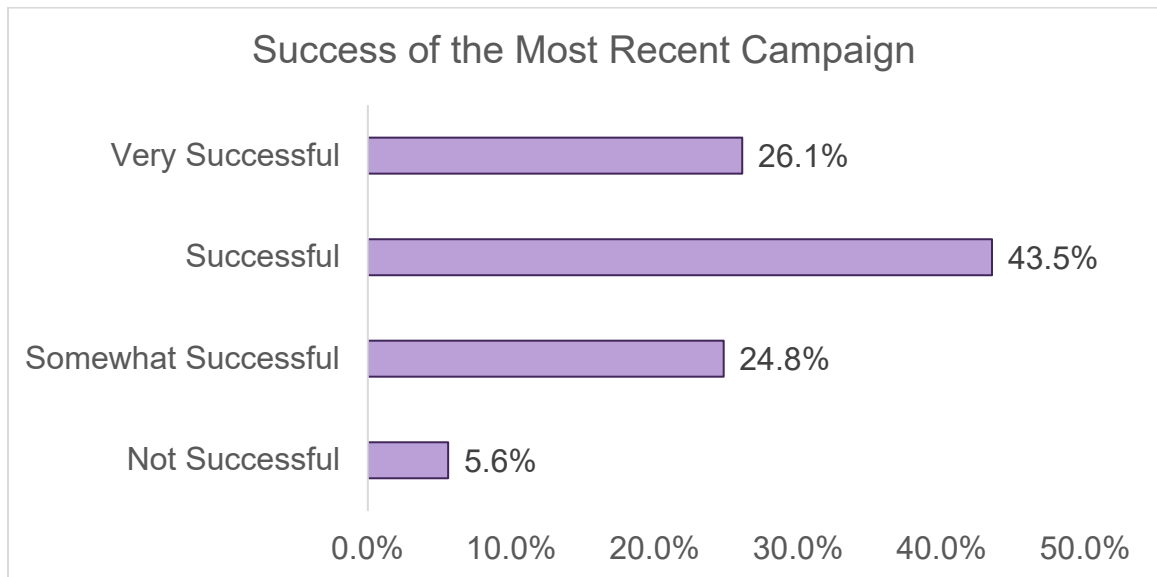
1. This first paper identifies key factors and activities that have led to successful stewardship outcomes.
2. The second paper will provide more detail on communications methods used in successful stewardship campaigns, including communications channels and messaging.
3. The third paper will focus specifically 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.

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?

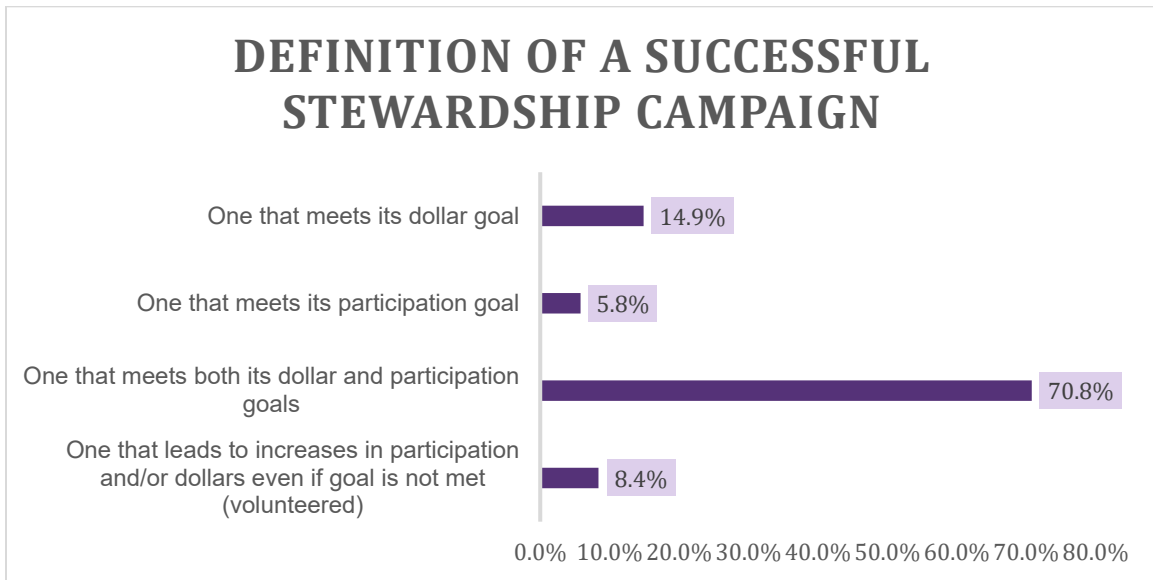
Over 2/3 of respondents (70%) view their most recent stewardship campaign as either “Successful” or “Very Successful”. Only 6% felt their campaign was “Not Successful”.



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?

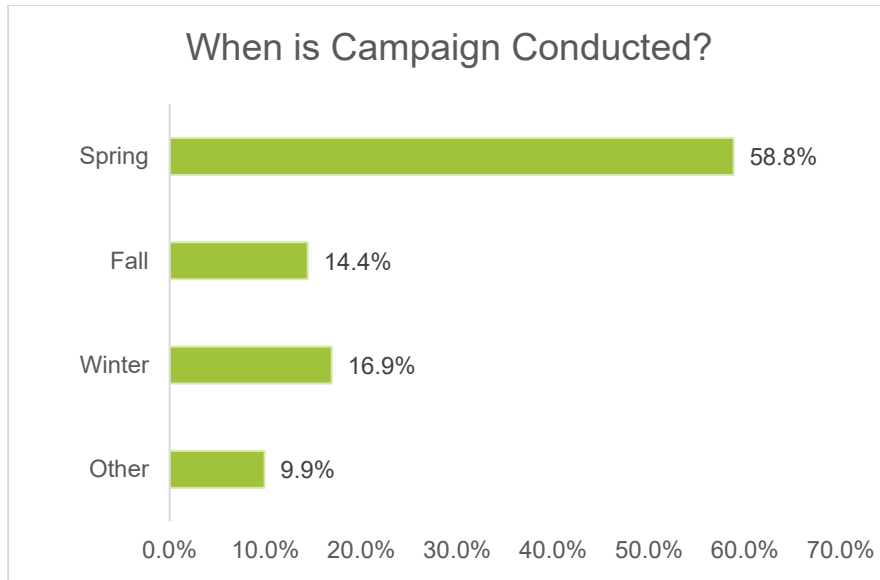
Success can be defined in many ways. The most common are whether the campaign met its dollar goal, its participation goal, or both. 71% of respondents indicated that they define success as meeting both the dollar and participation goals for the campaign.



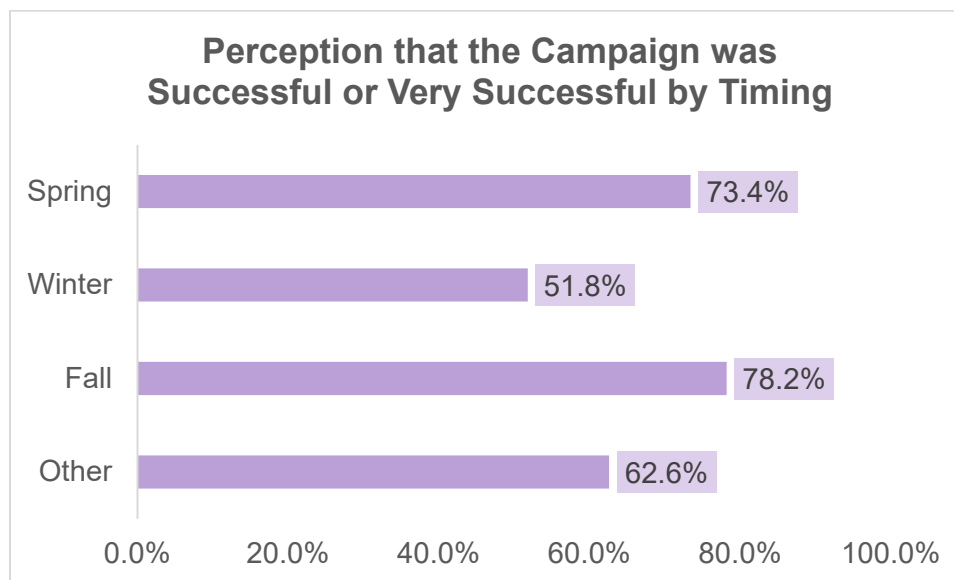
C. When are campaigns conducted and how does that affect success?

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.

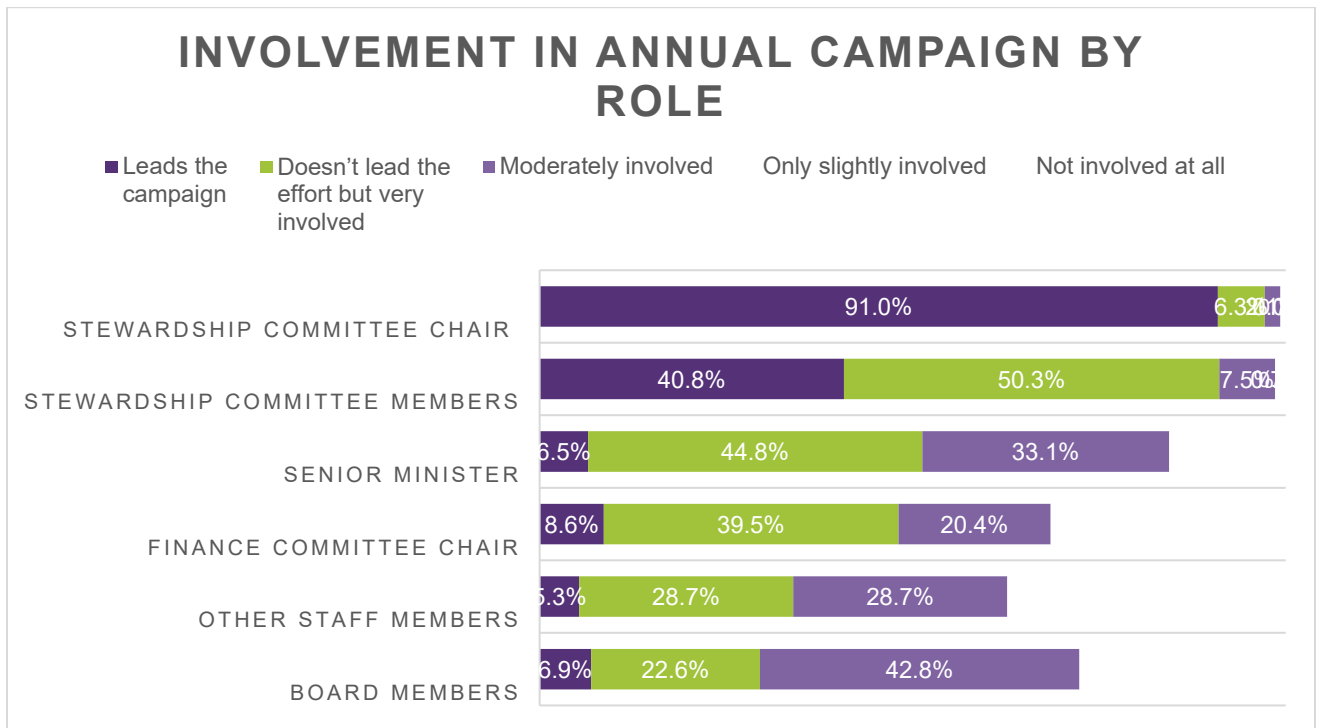


It should be noted that Spring campaigns were most likely affected by COVID-19 (the question was “how successful was your most recent campaign”, and the survey was conducted in the summer of 2020). COVID-19 would not have been a factor in Fall campaigns and would have only affected the final days of 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.



As also noted in the Effective Practices section below, survey results found that strong leadership and Senior Minister involvement are key factors in successful campaigns. Among congregations whose senior minister led or was very involved in the annual campaign, 72% said that their most recent campaign was “Successful” or “Very Successful,” compared to only 68% of congregations in which the senior minister was less involved in the campaign. This pattern was even more pronounced among congregations that said their campaign was “Very Successful,” with 32% of

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.

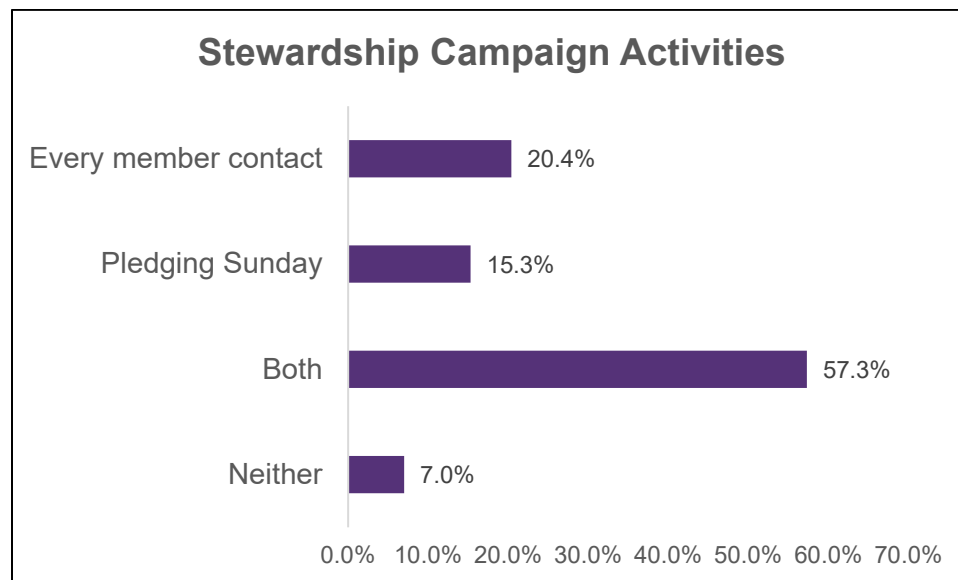
those whose senior minister led or was very involved in the annual campaign saying that their most recent campaign was ““Very Successful,” compared to only 20% of congregations in which the senior minister was less involved in the campaign.

E. What activities are included in stewardship campaigns and how does that affect success?

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.

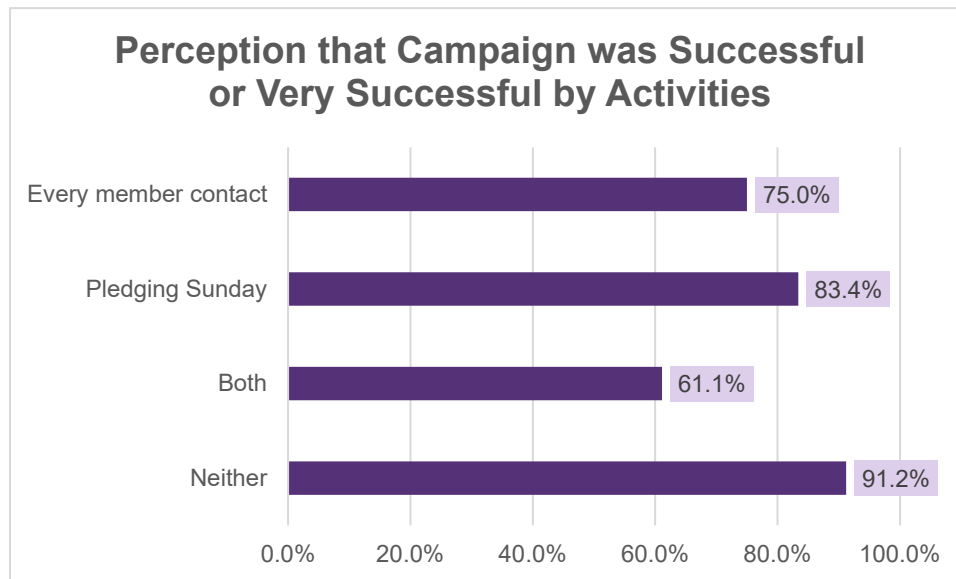
About three-fourths of congregations use at least one of these methods. 78% of congregations use some form of Every Member Contact, 73% hold a Pledging Sunday event, and many use both approaches. Only 7% of congregations use neither of these activities.

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.



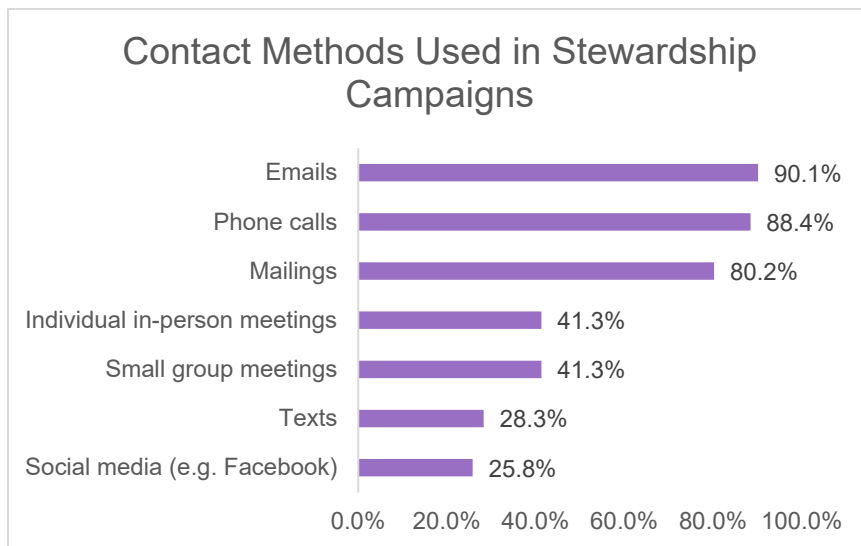
The relationship between activities and perceived success was different from what we expected. Specifically, congregations who used both methods were the least likely to say that their campaign was “Successful” or “Very Successful”.

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.

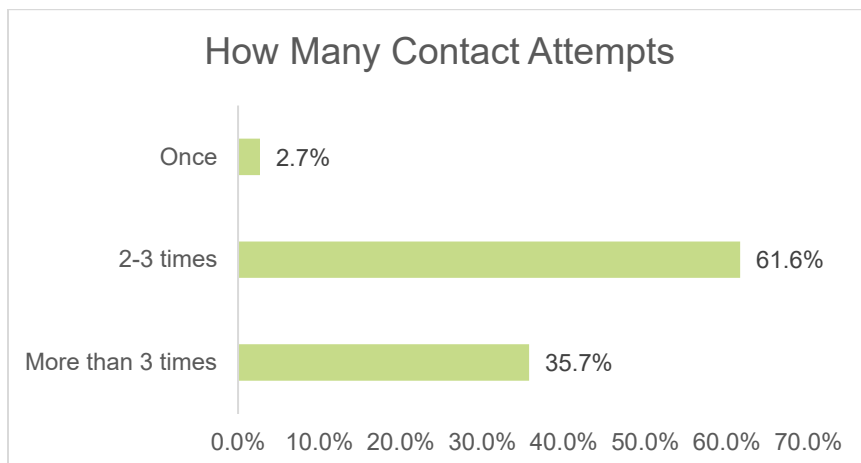


F. How are members contacted during an every-member contact campaign?

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

- Our success was also supported by key members of the Pledge Drive Team that tirelessly connected with members and friends to encourage turning in commitment cards.
- 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

- 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.
- 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.