

Improving Stewardship Outcomes in UU Congregations

Paper #4: Stewardship Beyond the Annual Campaign

February 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 (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.

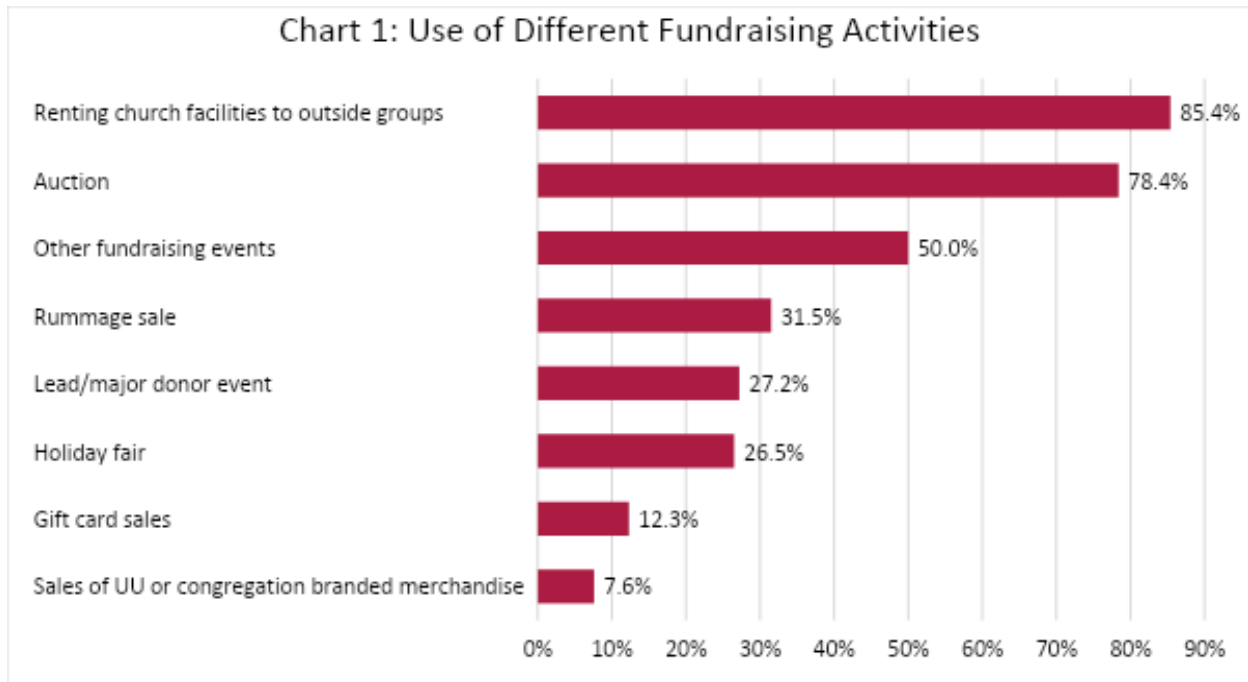
In most cases, the survey was completed by the Stewardship Campaign chair or a religious professional, and the results reflect their perceptions of stewardship in their congregation.

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.

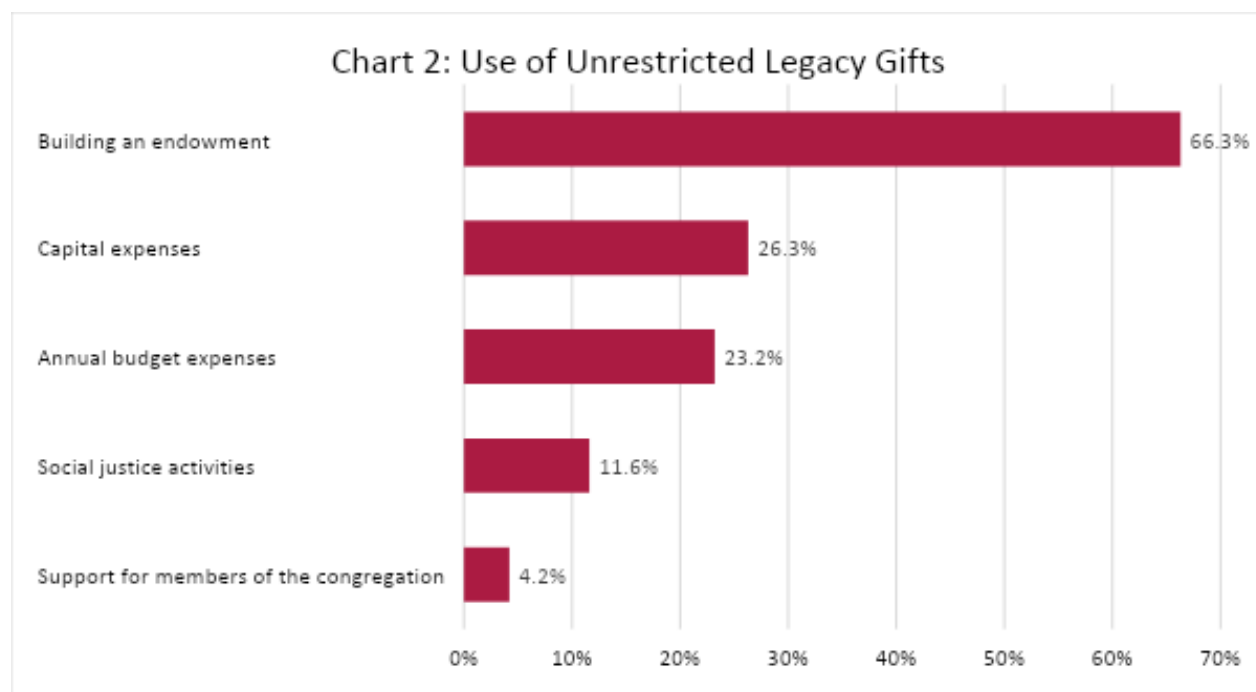
Congregations were also asked if they are currently conducting a capital campaign, an intensive effort to raise funds for a specific purpose such as building renovation, an endowment. Nearly a quarter (23%) of responding congregations indicated that they

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.

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.

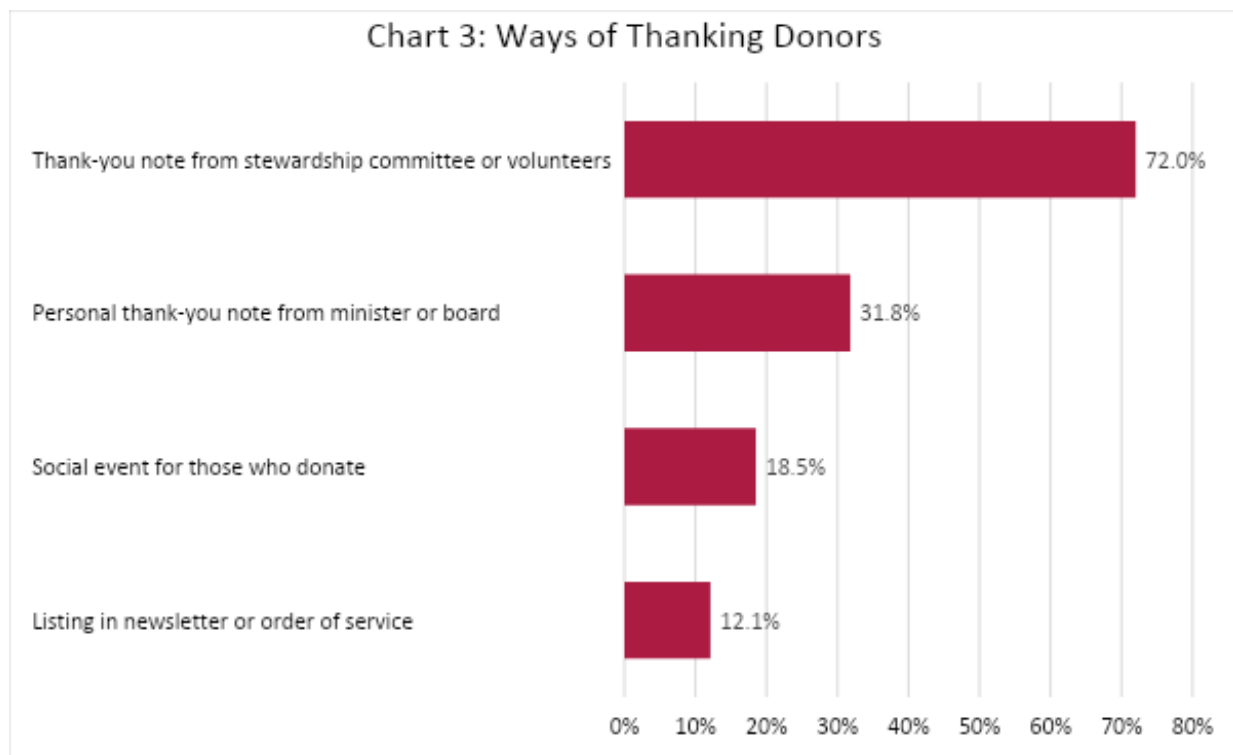


Survey respondents were also asked if their congregation had participated in the UUA's Wake Now Our Vision campaign, in which legacy gifts to congregations and

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

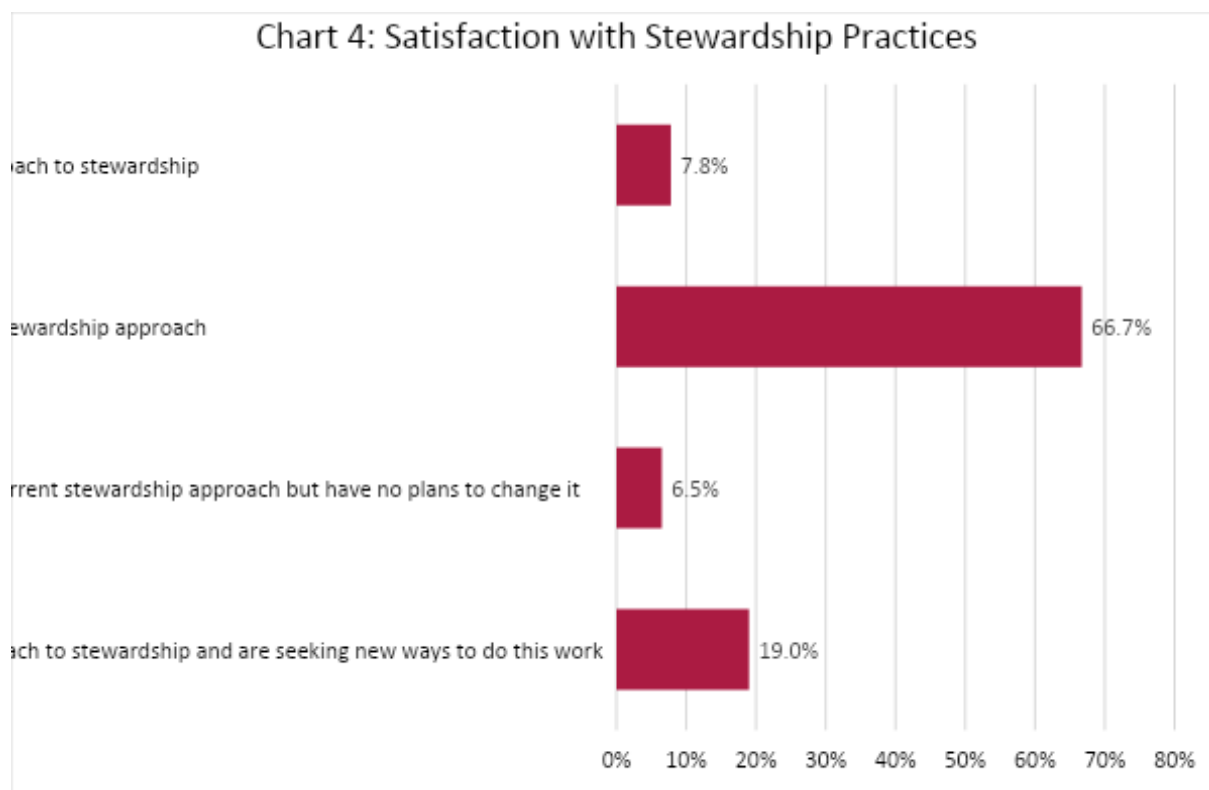
offered by Stewardship for Us, a UUA-affiliated consulting firm focused on fundraising and stewardship for UU congregations.

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.

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