



Jumpstart Your Annual Campaign

Webinar Session 1:
Building Your Campaign Calendar
October 2015

Presented by:
Mark Ewert & Barry Finkelstein
Stewardship For Us, Consultants



Intros: Rev. Scott Tayler



Stewardship FOR US
Building Cultures of Generosity and Commitment

Intros: Presenters

Accommodations? The *Stewardship for Us* Team

Presenters:

- Mark Ewert
- Barry Finkelstein



Stewardship FOR US

Building Cultures of Generosity and Commitment

Intros:



- **A two decade tradition of stewardship support to Unitarian Universalists**
- **Coordinated with UUA Congregational Life and the UUA Regions**
- **A full range of support for all size congregations, clusters, others**

- ✓ Next Steps Weekends
- ✓ Budget Drives
- ✓ Capital and Combined Campaigns
- ✓ Financial Feasibility Studies
- ✓ Endowment and Planned Giving
- ✓ Searching for the Future: Mission and Vision
- ✓ Strategic Planning
- ✓ Leader Retreats
- ✓ Workshops and Webinars
- ✓ Staff Training

www.stewardshipforus.com



Some Basics



- **Fits in a Larger Schedule of Fiscal Stewardship of Congregation:**
 1. Program proposals for coming year
 2. Draft budget created
 3. Annual Budget (Pledge) Drive
 4. Final pledge numbers given to budget builders
 5. Budget is finalized and presented to Board
 6. Board makes decisions/changes as needed
 7. Board votes to recommend budget to congregation
 8. Brings to congregation for vote, usually at annual meeting
 9. Payments start in new fiscal year

Some Basics



- **Optimal Duration of Drive:**
 - Have a definite public launch and public closing
 - 3 weeks to a month from launch Sunday to closing Sunday
 - Some communications before then
 - Short clean-up period after – then done!
 - An overly long drive (or long clean-up period) is not a good sign
 - Minimal distractions – and NO other fundraisers!
- **New member orientations, during the year**
- **Board orientation, annual drive as part of that**

Committee



- **Best planning is done when the last drive is wrapping up**
- **Recruit & orient new members**
- **Strategic review of last cycle: strategies, pledging levels, successes/challenges**
- **Make sure to thank your volunteers!**

Committee



- **What is your committee timeline?**
 - How often meet and where
 - What kind of committee communications, and when
 - Leadership and doers; differing calendars
 - Expected term of service
 - How committee recruitment happens, when
 - Term of service for co-chairs, and recruitment

Case Study #1



- **Annual Drive Dragging on Too Long**
 - The UU Fellowship of Uniburgh launches its Annual Budget Drive the first Sunday of March. It closes on the first Sunday of April
 - On closing Sunday, they have gathered about 55% of the expected pledge forms
 - The committee sends a letter to the non-responders the following week
 - Then calls folks who have not responded, then emails people they did not reach
 - The budget builders need a final total, yet also want more than what has been committed. In May they start badgering the committee for the final total
 - The committee keeps trying to reach the last 20% of pledgers until June 1
- **What would you do to “tighten up” this timeline? One answer each**

Partners



- **A good stewardship timeline is built with your Partners**
 - **Minister/worship team**
 - **Administrator**
 - **Communications (whoever does newsletter, email blasts, web page)**
 - **Membership**
 - **Board**
 - **Finance Committee**
 - **Religious Education (adults and kids)**

Partners



- **Minister(s)**
 - How does your minister(s) inform your timeline?

Partners



- **Administrator**
 - **What tasks does your administrator do, that would inform your timeline?**

Partners



- **Communications**
 - What does the communications team do that could inform your timeline?
 - Or what communications due dates can be added to your timeline?

Partners



- **Membership Committee**
 - What kinds of things does Membership do, that can be added to your timeline?

Partners



- **Board**
 - **What does the board do or what can they do, to inform your timeline?**

Partners



- **Finance Team**
 - What interactions does your committee have with the Finance Team, and how do they fit in your timeline?
- **Religious Education**
 - What activities does RE do, or might do that is added to your timeline?

Case Study #2



- **Annual Drive clashing agenda**
 - The UU Fellowship of Unistan launches its Annual Budget Drive the first Sunday October. It closes the last Sunday in October
 - The Friday before launch Sunday, the Green Sanctuary committee announces that it is raising money for solar panels on the fellowship hall. It is asking for donations of any amount but are hoping everyone will give \$250-\$300
- **What would you do to address the solar panel fundraising – one answer each?**

Combined Campaigns



- **Capital campaigns are often done at the same time as the annual budget drive**
 - This is called a combined campaign
 - This changes your timeline
 - Role of the annual drive team in a combined campaign
 - If a combined campaign expected in a coming year, the annual drive team can help do some preparation

Participant Question



- **Revisit Your Questions from the beginning of the Webinar**

Closing



Thanks!

To You Attendees & Viewers
The Unitarian Universalist Association



Barry Finkelstein

Stewardship &
Management Consultant
barry@stewardshipforum.com

Mark Ewert

Stewardship Consultant,
Author, Coach
mark@stewardshipforum.com