

Welcome! While You Are Waiting...

1. Find the “Chat” box (at bottom of screen).
Open it and:

- ✓ Enter your name, congregation name and location
- ✓ You can save the chat – find 3 dots in upper right of chat; hit “Save Chat”

2. Everyone’s mic is Muted now – find that button (bottom left)

3. If you have technical issues, put them in the chat and we’ll try to help



Join us with a chalice to light & share

Stewardship For Us 2020 Open Forum series



Capital Campaigns in the Virtual World

Barry Finkelstein and Mark Ewert
Friday, October 9, 2020



Building Cultures of Generosity and Commitment

Chalice Lighting, Reading, Introductions



The Gates of Hope – Victoria Stafford

Our mission is to plant ourselves at the gates of hope—
Not the prudent gates of Optimism, which are
somewhat narrower;
Nor the stalwart, boring gates of Common Sense;
Nor the strident gates of Self-Righteousness, which
creak on shrill and angry hinges (people cannot hear
us there; they cannot pass through);
Nor the cheerful, flimsy garden gate of “Everything Is
Gonna Be All Right.”



Chalice Lighting, Reading, Introductions



But a different, sometimes lonely place,
of truth-telling about your own soul first of all and its
condition,
the place of resistance and defiance,
from which you see the world both as it is and as it
could be, as it will be;
the place from which you glimpse not only struggle
but joy in the struggle.
And we stand there, beckoning and calling,
telling people what we're seeing,
asking them what they see.



Agenda

- Housekeeping
- Capital Campaigns Normal Phases and how we work
- In the Virtual World
- Examples
- Q&A and Discussion
- Wrap Up



Housekeeping Moment



- Slides/Blog
- Mute/Unmute
- Using the Chat, Saving the Chat
- Q&A and Discussion



Capital Campaign Plans

- Before you get started
 - The Big Why? Mission and Vision
 - Relatively healthy stewardship
 - Good governance and management
 - Up to speed on virtual strategies
 - Communications
 - Electronic Giving
 - Connecting



Capital Campaign Plans

And Role of Your Consultant

- Next Steps Process – virtual (readiness assessment)
- Support for timeline, engaging/educating congregation, financing options, governance/congregational polity
- Financial Feasibility study (15-20% of households)
- Educate, support campaign team
- Orient Visiting Stewards
- Leadership Phase
- General Phase
- Closing and Wrap Up
- Plans for next 3 years (collecting commitments)



In the Virtual World

- The basic process is the same:
 - Incremental steps to educate and inspire and engage
 - Most steps translate well to the virtual realm
 - We have successful experience
 - Opportunities to reach a wider donor base and to strengthen connections
 - Challenges: lack of informal engagement, events to build enthusiasm
- Considerations to assess whether this is the right time:
 - Asset values are high
 - Uncertainty is high
 - How urgent is your project?
 - How are your members feeling?
 - Vacant buildings offer advantages



Examples

Four ongoing virtual projects:

1. UU Cherry Hill, NJ, opportunity to implement long-desired facility improvements: conducted highly successful virtual campaign over the past 2 months, achieved 99% of goal
2. UU Church of Haverhill, MA, major facility and accessibility enhancements: campaign begun last winter, paused, and re-launched in virtual mode last Sunday
3. River of Grass UU in Davie, FL seeking new home: campaign put on hold last spring, moving forward now
4. Congregation with urgent needs coupled with strategic enhancements: proceeding along standard path and schedule, all virtual for now



What's the same and what's different?

On-site	Virtual
Proven process for planning and conducting capital campaigns for UU congregations	Generally the same, including emphasis on mission and vision and community-building
Getting large numbers of members to attend in-person meetings can be a challenge – childcare, scheduling, busy lives	More people can participate via Zoom, scheduling is easier, expand potential donor base
Opportunities for casual engagement, donor cultivation	Every interaction is intentional with little opportunity for spontaneity
Events are a critical component of capital campaigns	Be creative with virtual events
Physical opportunities to engage and communicate: info table, posters, tours, video loops	Enlist a team to leverage technology, consider investments in video creation, web site design, social media use, etc.

The same: need for consulting support from planning to completion!



Q&A and Discussion

Ask questions via the chat...



Closing Words

Hope, by Jennifer Pratt-Walter

See how the winds
have shaped her hands to
hold hope?
So tenuous, it trembles
like a hummingbird's heart.

She gently carries hope
to a nest in the midst
of the maelstrom and tilts it
into the bowl of tiny feathers and mosses.

Hope is so hard to cup.
She might need your help
when it seeps through the cracks
of her fingers. Place your hands
like this around hers. Together
it can be done.

When it hatches, when the nest
is no more, watch the wind pick up hope
and lay it softly into the welcome
of upraised palms.



Thank you for joining us!



Stewardship FOR US

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Stewardship For Us (S4Us)

- **A two-decade tradition of stewardship support to Unitarian Universalists for all size congregations and clusters**
- **Coordinated with UUA Congregational Life and the UUA Regions**
 - ✓ Next Steps Weekend and virtual Next Steps Weekend
 - ✓ Budget Drives
 - ✓ Capital and Combined Campaigns
 - ✓ Financial Feasibility Studies
 - ✓ Endowment and Planned Giving
 - ✓ Mission and Vision
 - ✓ Strategic Planning
 - ✓ Comprehensive Financial Planning
 - ✓ Leader Retreats & more ...

