

# Welcome! While You Are Waiting...

- 1. Let us find out who is with us today. Please 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.” Find Chat under “Documents” on your PC.
- 2. Everyone’s mic is Muted now – find that button (bottom left)**



*Join us with your favorite beverage, and light a chalice with us*



# ***Finding Your Congregation's New Normal- Time to Create or Revisit a Strategic Plan***



**A Stewardship for Us Webinar  
November 20, 2020**

*Building Cultures of Generosity and Commitment*



*Presented by:*

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# Opening: Make no little plans



**They have no magic to stir the blood and probably will not be realized.**

**Make big plans.**

**Aim high in hope and work, remembering that long after**

**We are gone our work will continue to be a living thing.**

**Remember that our children and grandchildren are going  
to do things that would stagger us.**

**So, make no little plans**

*Daniel Burnham*



# What We Will Cover

- **2020-2021 – big picture thoughts**
- **Vision and Mission statements**
- **Strategic Planning**
- **Long Term Financial Planning**



# 2020 – 2021: Top of Mind in Our Congregations\*

- **Name 3 challenges that you think your congregation will have to address in 2020-2021.**
- **Name 3 opportunities you see for your congregation in 2020-2021.**
- **Describe what, in your mind, is a must have in 2021-2022 for your congregation.**

*\*Take 5 minutes to add your thoughts in the chatroom – remember you can save the entire chatroom.*



# Present Day Context\*

- **Uncertainties**
  - **Financial**
  - **Duration**
  - **Facility needs**
  - **Political**
- **Virtual operations**
  - **Worship services**
  - **Other programs**
  - **Stewardship and Capital campaigns**
  - **Connections**
- **Future opportunities**



*\*Add to the Chatroom your thoughts on Uncertainties; What else will be virtual; and Future opportunities.*



# Vision and Mission Statements Defined

*“A congregational vision informs the mission statement. The mission statement helps determine the goals, and the action plan describes the activities chosen to support the goals.”*

*Wayne Clark, Beyond Fundraising*

Vision	Mission
Future Objective	Present Tense
Description of a future you are ultimately working towards	Describes what you do and who/what benefits from this work



# A Vision Statement's Purpose

***The Best Vision Statement will:***

**Guide Us**

**Remind Us**

**Inspire Us**

**Control Us**

**Free Us**



**Vision Statement – a Hoped for Future.**

***What will be different or better***

***after we succeed at what we're setting out to do?***





# A Mission Statement's Purpose

A guide in defining what your congregation is all about, why you exist, what you do and who or what you do it for.

- ✓ What problems does your work and services solve?
- ✓ Who/what benefits from your work the most?
- ✓ What would success look like?



# What Goes into a Strategic Plan?

## Strategic Plan Ingredients

1. Vision Statement
2. Mission Statement
3. Contextual Factors (internal, external)
4. Goals for each Mission Statement component
5. Key Action Areas to achieve Goals
6. Strategies to achieve Key Action Areas
7. Measures of success
8. Corresponding Strategic Financial Plan



## Questions to answer in the plan:

Who will be primarily responsible for each of the activities?

When are activities expected to be completed?

What resources (time, talent, treasure) are needed to complete each activity?

What barriers are we likely to encounter?

What are the sources of help and expertise?

How might we measure success?

How will we recognize success?



# Factors Influencing Strategic Choices

***What contextual factors influence discussion and decision making about risks for your congregation? In the Near term? Longer term?***

Internal context: congregational culture; Pandemic; member demographics (age, gender identity, gender politics, white majority); buildings, grounds, and space; lay and ministerial leaders transitions; the meaning of virtual congregations and worship; lifespan education; technical capacity of members; technical resources

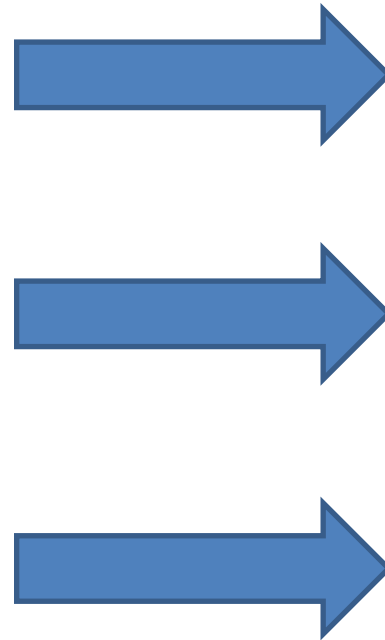
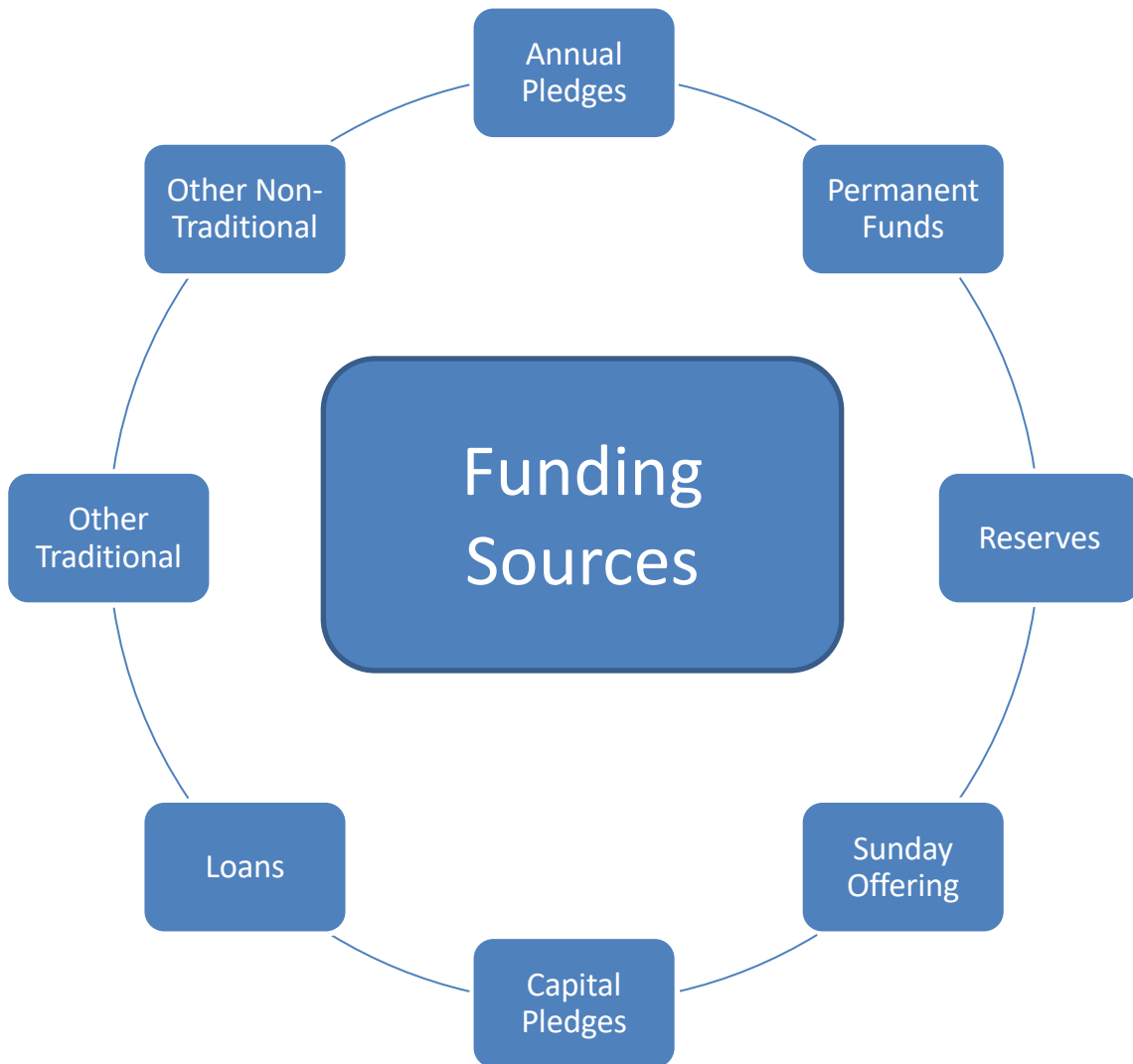
***\*What are top-of-mind internal considerations for your congregation?***

External context: Pandemic; changing geographic economic and employment base; demographic shifts; political shifts and local-national government; racial justice and white supremacy; climate change.

***\*What are key external factors affecting your community and congregation?***



# Link Comprehensive Financial Planning with Strategic Planning Priorities



Expenses  
Mission-based  
Budget

- Worship & Music
- Social Justice
- Faith Development
- Nurturing Community
- Denominational Connection
- New Initiatives



# Factors that can Contribute to Financial Stability

- ✓ **Healthy Annual Giving – growing with the budget**
- ✓ **Balanced Annual Operating Budget over 3 – 5 years**
- ✓ **Staff Well Compensated - within UUA guidelines and not working extra hours**
- ✓ **Operating Reserve Fund –6 months to 2 years equivalent of annual operating budgets**
- ✓ **Major Maintenance Reserve Fund – special needs beyond operating**
- ✓ **Membership Stability or Healthy Membership Growth**
- ✓ **Planned Giving and a healthy Endowment**
- ✓ **Reserve Fund and Endowment use policies**
- ✓ **Diverse Revenue Streams – Annual Giving, Fundraisers, Rentals, Legacy,**
- ✓ **Capital Campaigns – Every 10 years more or less**



# Five Year Plan



## Strategic Financial Plan Template

RESOURCE DRIVERS	YEAR							
	-1	-2	CURRENT	1	2	3	4	5
Number of members								
Average Sunday attendance (by service if multiple)								
RE enrollment								
Average RE attendance (by meeting time if multiple)								
# Classrooms needed								
Long-term funds balances (itemize endowments, trusts, etc.)								
Other key parameters (e.g., parking spaces)								
Number of donor households								
Average annual financial commitment (pledge)								
<b>CASH FLOW (Tailor rows and formulas, and apply formulas to all years)</b>								
Total annual financial commitments	0							
Total capital campaign commitments if applicable								
Other revenue (itemize major sources and amounts or roll up from details in a separate tab or below)								
<b>TOTAL REVENUE</b>	0							
Staffing – number and details (feel free to roll up from details on a separate tab)								
Payroll expense								
Debt service								
Contribution to reserves								
Generosity (social justice, denominational connection, etc.)								
Capital Expenses if applicable								
Other expenses (itemize facility costs and a small number of other major cost elements or roll up from details in a separate tab or below)								
<b>TOTAL OPERATING EXPENSES</b>	0							
<b>Debt Service as a Percentage of Total Expenses</b>	#DIV/0!							
<b>NET INCOME/LOSS</b>	0							

### PARAMETERS AND ASSUMPTIONS (ITEMIZE ALL THAT APPLY; EXAMPLES BELOW)

- Year-over-year membership growth rate
- Year-over-year change in average financial commitments
- Change in debt service (new loans, payoff of existing loans)
- Introduction of new initiatives and other expense items
- Itemization of other revenue amounts from Row 16
- Details of staffing by position and compensation and benefits
- Itemization of other expense amounts from Row 24



# Financial Plan Structure and Development

## Consider how best to organize *your* plan:

- ✓ Make a plan for the plan: who will work on it, schedule, what stakeholders will need to be contacted for information
- ✓ Identify the resource/revenue drivers
- ✓ Identify the resources
- ✓ Identify core areas of expense – include your Social Justice giving
- ✓ Focus on your mission and your strategic goals when creating assumptions like growth rate, staffing
- ✓ Use different scenarios, e.g., no change, some change, ideal
- ✓ Use past experience to develop the *No Change* scenario
- ✓ Don't get bogged down – *this is an iterative process*

Schedule regular reviews of the plan and update it.



# Questions?

# ???

**Please post your questions in the chat.**





# Extinguishing the Chalice

## *“When Giving Is All We Have”*

*One river gives  
Its journey to the next.*

We give because someone gave to us.  
We give because nobody gave to us.

We give because giving has changed us.  
We give because giving could have  
changed us.

We have been better for it,  
We have been wounded by it—

Giving has many faces: It is loud and  
quiet,  
Big, though small, diamond in wood-nails.

Its story is old, the plot worn and the pages too,  
But we read this book, anyway, over and again:

Giving is, first and every time, hand to hand,  
Mine to yours, yours to mine.

You gave me blue and I gave you yellow.  
Together we are simple green. You gave me

What you did not have, and I gave you  
What I had to give—together, we made

Something greater from the difference.

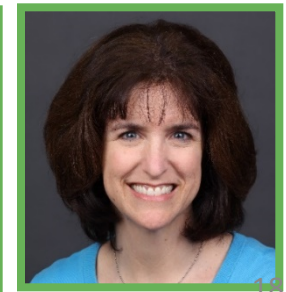
[Alberto Ríos](#), 2014



# Stewardship For Us (S4Us)

- **A two-decade long 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 Process
- ✓ 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



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