

FAST FACTS

Unitarian Universalist Association of Congregations
Congregational Stewardship Services

wclark@uua.org

207.829.4550

FY 1999 through FY 2008

933	contracts with congregations
1,689	consultant visits to congregations
727	congregations served
199	capital campaigns conducted
\$89,550,000	capital campaign funds raised by congregations with our counsel
184	annual budget drives conducted
\$35,190,000	annual operating funds raised by congregations with our counsel
4.4%	average consulting costs as percentage of money raised

9.09

Unitarian Universalist Association of Congregations Office of Congregational Stewardship Services

Wayne B. Clark, Director
wclark@uua.org
(207) 829-4550

We partner with congregations to help each community
transform its unique vision into bold action.

Answers to Frequently Asked Questions

1. How can Congregational Stewardship Services be helpful?

We offer consulting guidance with annual budget drives, strategic planning, capital campaigns, and planned giving. We also offer building loans, small project loans, loan guarantees, first home grants, and green construction awards to qualifying congregations.

2. What is an assessment visit and why should we start with it?

The purpose of an assessment visit is to determine a congregation's readiness to launch an annual budget drive, a capital campaign, a strategic planning initiative, and/or a planned giving effort. An assessment visit can be helpful whenever a stewardship-related external, objective analysis of your congregation is needed. The specific focus of the visit is determined by your congregational leaders and may include several topics: Your most recent annual budget drive might have failed to meet your financial goal. Or your planned giving program might be inactive. Or you might have deferred maintenance needs. Or there might not be consensus around your vision and mission. Or you might need additional facilities to house your growing congregation. In any of these situations, a UUA stewardship consultant can offer an external, objective analysis.

3. Can we choose a specific stewardship consultant to work with us?

The Congregational Stewardship Services director matches the needs of your congregation with the skills of one of our consultants. However, if you request a particular consultant, every effort will be made to assign that consultant to your congregation.

4. What are the qualifications of the stewardship consultants?

Each consultant is a Unitarian Universalist lay leader who has been active in their home congregation. Some are ordained Unitarian Universalist ministers. Before "solo" consulting with a congregation, each new consultant shadows several veteran consultants for six months to a year. In addition, new consultants participate in conference calls with

the team of consultants, they participate in our January retreat, and they meet during General Assembly each June. At this writing, the nine stewardship consultants have a combined total of more than 200 years experience.

5. What is the cost of an assessment visit?

An assessment visit includes 8 to 12 hours of on-site consultation. The cost is \$1,000 if your congregation is contributing its recommended fair share to the UUA Annual Program Fund. The Congregational Stewardship Services program pays for all consulting expenses, including air fare, ground transportation, lodging, meals, and materials.

6. After an assessment visit, how much will it cost for a stewardship consultant?

Following an assessment visit, we use a sliding fee scale, based on the size of your congregation. In fiscal year '09, the fees range from \$760 to \$1,400 per eight-hour day. Let's take the example of a 250-member congregation that wants help with an annual budget drive and a capital campaign. Let's assume that the congregation needs 14 days of consulting, spread out over two years. Let's further assume that the consultant helps the congregation raise \$300,000 for the annual operating budget and \$1 million during their capital campaign. In this example, total consulting costs of \$17,800 (including the assessment visit) would represent an investment of less than two cents of every dollar raised by the congregation in their annual budget drive and capital campaign.

7. Can you help us become more comfortable talking about money?

Yes. Using *Beyond Fundraising: A Complete Guide to Congregational Stewardship* (<https://www.uua.org/bookstore>) as a core resource, a stewardship consultant can help move your congregation from a myth of scarcity to the reality of abundance.

8. Can you tell us how much money we should each contribute to our congregation?

No. Each congregant must decide for themselves how much to contribute. Some people find it helpful to refer to the Suggested Fair Share Giving Guide in *Beyond Fundraising* and at www.uua.org/documents/congservices/stewardship/fairshareguide.pdf.

9. Does the UUA offer any financial help for congregations?

Yes. We offer several programs that provide financial assistance including a building loan program, a loan guarantee program, a first home grant program, a small project loan program, and a green construction award program. For more information, go to www.uua.org and Google the name of these programs.

10. Do you have references for us to contact?

Yes. We have consulted with several hundred congregations since 1985 and we are pleased to provide references at your request.

**UNITARIAN UNIVERSALIST ASSOCIATION of CONGREGATIONS
CONGREGATIONAL STEWARDSHIP SERVICES**

ASSESSMENT VISIT OVERVIEW

We partner with congregations to help each community transform its unique vision into bold action.

The purpose of an assessment visit is to determine a congregation’s readiness to launch an annual budget drive or a capital campaign. There are three outcomes of an assessment visit.

First, an assessment visit provides an opportunity for your congregation to get an objective assessment from a UUA stewardship consultant. Prior to the visit, congregational leaders send extensive written information to the consultant. Once on site, the consultant gathers more information in a series of meetings with key constituents, often including the following professional and lay leaders.

- | | |
|--|--|
| Minister(s) | Annual budget drive chair |
| Director of religious education | Strategic planning committee chair |
| Any other professional staff members | Building/grounds committee chair |
| Finance committee chair | Members of the governing body |
| Person responsible for nurturing new members | Person responsible for coordinating volunteers |

Second, an assessment visit provides your congregation with specific recommendations to get “from here to there.” Based on all the gathered information, the consultant lists several steps necessary to allow your congregation to reach its long-term goals. These recommendations are given verbally at the end of the assessment visit, and are then followed by a written summary. The recommendations may address the following issues.

- | | |
|---|------------------------------|
| Five-year strategic plan | Capital campaign |
| Planned giving program | Facilities planning |
| Annual budget drive | Commercial loans |
| UUA loans, loan guarantees, grants and awards | Congregational growth issues |

Third, an assessment visit clarifies how the Congregational Stewardship Services program can be helpful to your congregation. The program has provided consulting services to hundreds of congregations since 1985 and each consultant brings special skills, as well as the combined skills and experience of the other consultants. Each is prepared to guide and coach your congregation through all aspects of your comprehensive stewardship needs.