

## **Next Steps Weekend Report**

### **All Souls Unitarian Universalist Church, Kansas City, MO**

#### **INTRODUCTION AND SUMMARY**

This report presents the results of a Next Steps Weekend (NSW) with All Souls Unitarian Universalist Church - Kansas City. The visit was conducted by Barry Finkelstein, a Unitarian Universalist (UU) Congregational Stewardship Consultant with The Stewardship Team. This report is based primarily on an intensive weekend on site, May 8-10, 2015.

#### ***Goals***

All Souls' primary goals in engaging a stewardship consultant are to (1) help assess the congregation's awareness of the proposed renovation and building addition plans; (2) help assess financial capacity and readiness for a capital campaign; and (3) provide advice on next steps.

#### ***Highlights of Results***

The primary conclusion of the Next Steps Weekend is that All Souls is ready to move toward a successful capital campaign. All Souls has many strengths that will provide a firm foundation for the campaign. During the weekend, people shared powerful stories about All Souls, describing a strong community that takes care of its members, welcomes newcomers, lives its values as a force for justice, offers strong programs and stimulating worship services, and challenges people to be their best. There was much proud talk of your upcoming 150th anniversary milestone and how that will coincide with the UUA General Assembly and be a significant motivator for the capital campaign. There was solid consensus that you want to grow.

On the capital campaign "balance sheet" included in the report, the positives far outweigh the challenges, and a capital campaign and building project can be a great inspiration for addressing the challenges. People I met are confident that All Souls is in a healthy, strong place right now, having come through trying times with new processes, covenants, and skills for working together. The recent work you have done on vision and facility needs, with over 100 people participating, is a great start.

The following recommendations, which are fleshed out in the report, will help All Souls move forward effectively:

- Continue the conversation begun during the weekend, sharing your dreams and talking about the financial commitments it will take to make these dreams a reality.
- Develop a five year resource and financial plan to communicate clearly what is possible and the expectations regarding annual and capital financial commitments.
- Organize, plan, and carry out a capital campaign, beginning immediately and continuing through the Winter of 2016.
- Strengthen finances with an independent audit, evaluating your year-round pledging process, and exploring ways to increase planned giving and innovative use of the endowment.

**Basic Data**

Name and Mailing Address of Congregation	All Souls Unitarian Universalist Church 4501 Walnut Kansas City, MO 64111 816-531-2131
Website Address	AllSoulsKC.org
Dates of Visit	May 8-10, 2015
Ministers	Rev. Dr. Kendyl Gibbons, Senior Minister Rev. Judith Cady, Religious Education Minister
Point of Contact	Lamar Hicks, Congregation President and Co-Chair, Feasibility Team
Number of Members	321
Fiscal Year	July 1 to June 30
Annual Operating Expenses	\$519,000 (Background Information Form)
Annual Financial Commitments (2014)	\$295,000 (179 household donors) = 57% of operating expenses
Average Financial Commitment	\$1,610 (mean) \$1,080 (median)
Quartiles	1 <sup>st</sup> : 11 households, 6% 2 <sup>nd</sup> : 21 households, 12% 3 <sup>rd</sup> : 38 households, 21% 4 <sup>th</sup> : 110 households, 61%
Trust or Endowment (Permanent Funds)	\$1.5M
Approach to Annual Budget Drive	Year-round pledging, minister-hosted stewardship dinners
Mission	<ul style="list-style-type: none"> <li>• Build a respectful, caring community</li> <li>• Inspire personal and spiritual growth</li> <li>• Create a just and compassionate society</li> </ul>



### ***Advance Contacts and Preparation***

In advance of the weekend visit, Barry had several calls and email exchanges with Lamar Hicks, point of contact for the NSW. He had a video conference with the Feasibility Team and a phone conversation with Rev. Gibbons. He also spoke with Nancy Heege, of the UUA Mid-America Region and Rev. Jennifer Brooks, recent Interim Minister at All Souls. He reviewed extensive materials provided by All Souls, including information on finances and annual financial commitments, the proposed building renovation and activities of the Renovation Concept Team, and overall information on All Souls history, governance, programs, and activities.

### ***Visit Schedule and Process***

The schedule for the weekend visit is presented as Appendix A. During the Friday and Saturday sessions, Barry toured the facility and learned some of the congregation's history, and met with 56 people, including the Senior Minister, other staff, and representatives of key committees and constituent groups, including the Board of Trustees, Feasibility Team, religious education, music, social justice, facilities, finance, and past presidents. He led a stewardship workshop on Saturday afternoon attended by approximately 35 people. During the Sunday morning service, he delivered a stewardship reflection (outline provided as Appendix B), a summary of this report, and answered questions. The weekend concluded with a wrap-up meeting with the leadership to review his observations and recommendations in more detail.

### ***Survey Results***

Thirty-six people who attended the Friday and Saturday sessions completed a brief anonymous survey via Survey Monkey. The form is shown in Appendix C and the results in Appendix D. The survey asked people to identify important milestones in the life and history of All Souls, the Congregation's strengths and challenges, and to indicate a preference for growth. The survey results indicate a strong, resilient congregation with significant strengths and a positive sense of its history and current context, consistency in a desire for growth, and a realistic appreciation for challenges to be faced.

The most frequently cited major milestones span much of the history of All Souls and include: (1) Rev Bragg's ministry from 1952 to 1973 and his connection to humanism and the Humanist Manifesto; (2) the recent conflict, healing, and recovery surrounding your interim minister; (3) the move to the current location; and (4) the calling of Rev. Gibbons.

There was a high level of consistency in preferences for growth. All but one of the 36 respondents indicated a desire to grow in membership numbers, and 32 of the 36 respondents indicated a preference for 10% or greater annual growth.

The three most frequently cited strengths are (1) the congregation's social justice work especially in the local community; (2) the people, notably their intelligence, talent, creativity, and tenacity; and (3) your location. Others cited frequently are being an open and welcoming, caring and supportive community; the religious education and music programs; being a liberal faith presence with an important message; and Rev. Gibbons.

The three most frequently mentioned challenges are (1) achieving membership growth; (2) ensuring finances and generosity both for annual giving and a potential capital campaign; and (3) addressing the shortcomings of the facility. A close fourth is addressing an aging congregation, engaging more younger members and families, encouraging younger people to take on leadership roles, and being relevant to people of all ages. Other challenges cited are continuing to focus on All Souls' mission for social justice in the community; the constraints of the current location; and growing the volunteer base and leadership development.

Several responses recognize the challenges associated with growth and change, noting that to grow, the congregation must be open to new people and new ideas, and must be intentional in making room for new leadership.

Several of the cited strengths and challenges are closely linked – two sides of a coin. For example, the most frequently cited strength is social justice work in the community, and one of the top challenges is sustaining and continuing that work. Your location was cited among the major strengths, and the constraints of the location, primarily parking, was prominent among the challenges.

### ***Workshop Products***

The Saturday afternoon open forum included two workshop exercises, the results of which are summarized below. The first invited people to remember and share a meaningful moment for them at All Souls and then to note what is special about the congregation that enabled that to happen. The special characteristics of All Souls that emerged are:

- A safe, loving, and supportive community
- Welcoming and open, embracing differences
- The people
- Live our values – we are out there doing things, 150 year history of social justice, leading edge for justice
- Music
- Intellectual rigor and intellectual freedom
- Challenges us to be our best
- Intergenerational respect
- Balance of tradition and innovation

These characteristics are highly consistent with the strengths noted on the survey.

The second exercise was a brainstorming activity to reflect peoples' reactions to the word "money." As All Souls begins to plan seriously to conduct a capital campaign – which entails talking with one another openly about money – it is important for members to understand their personal thoughts and feelings about the topic. Many of us have strong associations and "baggage" about money and its place in our lives and in our congregations, and these can get in the way of open and honest discussion. The raw results of the brainstorming are shown in Figure NSW May 8-10, 2015

1, with each term characterized as positive, negative, or neutral. While this is a limited sample, the results are encouraging, with positive terms outnumbering negative ones by nearly 3 to 1, which should give you confidence to talk with one another openly in a spirit of hope and promise.

**Figure 1: Brainstorming Results about Money**

<b>Positive</b>	<b>Negative</b>	<b>Neutral/Ambiguous</b>
<ul style="list-style-type: none"> <li>• Security</li> <li>• Tool</li> <li>• Opportunities</li> <li>• Legacy</li> <li>• Abundance</li> <li>• Lots</li> <li>• Security</li> <li>• Retirement</li> <li>• Travel</li> <li>• Generosity</li> <li>• Possibilities</li> <li>• Freedom</li> <li>• Resource</li> <li>• Enough</li> <li>• Options</li> <li>• Wishes</li> <li>• Support of children</li> <li>• Arts</li> <li>• Conscience</li> </ul>	<ul style="list-style-type: none"> <li>• Stress</li> <li>• Bills</li> <li>• Debt</li> <li>• Student loans</li> <li>• Fights</li> <li>• Bankrupt</li> <li>• Guilt</li> </ul>	<ul style="list-style-type: none"> <li>• Inheritance</li> <li>• Work</li> <li>• Make do</li> <li>• Savings</li> <li>• Contributions</li> <li>• Trade-offs</li> <li>• Planning</li> <li>• Responsibilities</li> <li>• Budgets</li> </ul>

*Accomplishments to Date*

All Souls has accomplished much toward a building program and capital campaign, including:

- Made foundational decisions, notably the decision to remain at the current location
- Engaged the congregation via an intentional discernment process
- Established leadership teams to begin work on the facility plans (Renovation Concept Team) and a capital campaign (Feasibility Team)
- Developed and refined initial plans based on past efforts and congregational input
- Addressed broader issues including work on mission, leadership and governance, covenant, and conflict resolution (Action Planning Team and more recent efforts)

The discernment process, which was led by a Vision Task Force, conducted listening sessions with approximately 100 members participating. The results included specific requirements and aspirations for the facility renovations and expansion, along with ideas to guide future



programming, staffing, and other vision elements. The highlights of the results, which are consistent with the information collected during the Next Steps Weekend, are as follows,

- All Souls will enhance our current facility to ensure structural integrity, environmental responsibility, accessibility, and an inspiring aesthetic.
- We will provide programming for all ages. We will aim to attract younger members to assure diversity, growth and vitality.
- We will strengthen our community partnerships to promote social justice and community service.
- All efforts will be in accordance with our mission and our seven UU principles.

**FINDINGS AND RECOMMENDATIONS**

*Readiness for a Capital Campaign*

Figure 1 is a “balance sheet” showing positives and challenges for All Souls in terms of readiness for a capital campaign. As shown, the positives are many and outweigh the challenges, indicating that you are ready to conduct a successful capital campaign. Moreover, as discussed during the weekend, the process of gearing up and conducting the campaign will help you address some of the current limitations, for example, enabling you to expand and extend your current stewardship processes.

**Figure 1: Capital Campaign Balance Sheet**

Positives	Challenges
<ul style="list-style-type: none"> <li>• Excellent progress toward a building program and capital campaign – decision to stay; congregational engagement (over 100 people); developed initial renovation plans</li> <li>• Senior minister who is a stewardship leader and innovator, experienced in capital campaigns, and comfortable being open about money in church. Other staff also comfortable connecting with their constituencies about stewardship.</li> <li>• Money exercise and other NSW activities were all heavy on the positive side (see above)</li> <li>• Potential for significant lead gifts.</li> <li>• The project appeals to many constituencies and mission areas, including music, religious education, worship, social justice, accessibility.</li> <li>• Success with last capital campaign in the late 1990s; raised 4X annual giving (\$800,000) and accomplished a great deal.</li> </ul>	<ul style="list-style-type: none"> <li>• No recent experience with one-on-one stewardship campaigns, which will be needed for the capital campaign.</li> <li>• Recent divisive and traumatic events surrounding your interim minister</li> <li>• Project doesn’t address parking, a key constraint</li> <li>• Flat membership and pledging over the past few years, still recovering from the economic downturn. Percent of total revenue from pledging is low, under 60% vs 80+% as an ideal</li> </ul>



Positives	Challenges
<ul style="list-style-type: none"> <li>• Location – All Souls is well situated and visible in the highly desirable Country Club Plaza area of the city</li> <li>• Strong programming and special attributes – social justice, music, and RE programs; welcoming, caring, open community. These and more were cited during the NSW workshops and survey responses.</li> <li>• Innovative and adaptive, for example, introduction of year-round pledging and technology in worship</li> <li>• Good timing for a capital campaign to coordinate with the 150<sup>th</sup> anniversary of founding in 2018 along with the UUA General Assembly to be held in Kansas City in 2018.</li> <li>• Work done in response to the trauma – healing, learning, governance, conflict resolution, reconciliation; and future planned work to be done by your intern minister</li> </ul>	

***Recommendations***

Pursuing the following recommendations will help you address the above challenges and opportunities and move toward a successful capital campaign.

***1. Deepen and broaden the conversation***

People shared deeply personal stories about their experiences at All Souls and about the special characteristics that enabled those experiences to happen. Sharing such stories deepens connections to one another and to the congregation, leading to greater commitment of time and money. Keep the conversation going by making this report widely available and providing opportunities to broaden the discussion. Use electronic communications and social media as well as small and large group gatherings for this ongoing conversation.

And there’s nothing more effective than talking with one another during coffee hour and other informal settings, inviting each other to share what’s special about All Souls and how it has transformed your lives. Share your dreams for the future of All Souls and its mission and ministries, and talk about the money it will take to get there and how we can create a culture of joyful giving. Arrange for various forums to discuss the finance side of the project as much as the building side. Becoming comfortable talking with one another about money in church will enable you to conduct a campaign based on one-on-one personal conversations, which is essential for the capital campaign. Several exercises during the NSW Saturday afternoon workshop demonstrated that members are fully capable of having these conversations and, more important, that these conversations will



be enriching and enjoyable.

**2. *Develop a long-range resource and financial plan***

Identify the resources needed to support your long range vision over the next five years at least. The plan should present all assumptions about annual budgets and required pledging to support your goals and objectives. Appendix E is a template you can use to get this started, tailoring it as needed. Include any one-time and ongoing costs related to the building program, including the potential for some level of mortgage financing to supplement the capital campaign. Consider any potential changes in staffing needed to support anticipated growth and mission and program needs. Present the financial plan to the congregation in various ways and discuss assumptions and implications for annual pledging; this can be an excellent vehicle to encourage members to think about their financial commitments in a new light. Coordinate with the various programs and constituencies to ensure that their resource needs are reflected and to inspire generous giving for annual and capital campaigns from all parts of the church community.

**3. *Plan and organize for a combined campaign for Fall and Winter of 2015-2016***

The work of preparing for and conducting a building renovation program and capital campaign should proceed along two parallel and highly coordinated tracks -- one focused on the building project and one on the financing. I recommend that you consult [Beyond Fundraising](#), by Wayne Clark, especially Chapters 10 and 12, as a guide to pursuing this work. As you plan and carry out the campaign, consider the following key success factors:

- Engage many people and ensure that the leadership team and sub-groups reflect the diversity of the congregation – include newer and younger members and reach out to all constituencies when recruiting.
- Create a strong linkage between building plans and investments and mission, vision, and programs. People give to mission, dreams, and possibilities, more than to buildings.
- Generate and sustain excitement and momentum – another congregation I worked with used the term “hoopla.” Be sure that the project and campaign are highly visible and are viewed as among the top one or two priorities for the upcoming church year.
- Take advantage of the church’s 150<sup>th</sup> anniversary in 2018 as one element of the theme for the campaign. Such major milestones are valuable motivators.
- Educate the congregation about the financial aspects of a successful capital campaign, noting that success depends on a combination of major gifts and 100% participation. The education process must be ongoing, repetitive, relentless, and must exploit all communication channels.
- Treat each other well during the process – recognize that a major facility project and capital campaign require many decisions and introduce new levels of stress into congregational systems. They are also wonderful opportunities that tend to bring out the best in us – if we are intentional and covenantal about how we engage with one another. So I invite you to bring to bear the learnings from your

recent interim minister conflict, and treat each other with kindness, respect, open minds, open hearts, and perhaps most important, open ears.

There are different ways to organize the work; one approach I like is to establish a steering committee, a building team, and a finance team. Some congregations establish these to serve for the duration of the project; others establish specialized teams for shorter duration tasks, such as choosing an architect. In general, it is a good idea to balance continuity in key leadership roles with recruitment for specific tasks that are a good match with their skills and schedule constraints. This gives you a chance to engage more people – a key to success – including those who do not think of themselves as money or building people, for example, people who can help with communication, parties or events, etc. Table 1 is a way to organize the work along these two tracks and also shows the role of the board and ministers.

Developing and refining the project scope and determining financial capacity is a “chicken and egg” process, with plans and budgets refined and honed incrementally to lead to the conduct of a financial feasibility study (FFS) to assess congregational support for a specific plan. To begin, determine an initial range of project sizes that seem possible; often this is based on multiples of annual giving. In the absence of other information, most congregations begin with 3-5 times annual giving. Since All Souls’ annual giving is approximately \$300,000, this would indicate a campaign in the range of \$900,000 to \$1,500,000. However, the likelihood of major donors can enable a congregation to raise significantly more than these ranges. Accordingly, the early steps entail developing an “essential gifts chart” that shows the likely distribution of contributions needed to reach a given goal, and then discussing this chart with potential major givers. This will help you refine the range of estimates to use at the beginning. All Souls’ current renovation plans are estimated to cost in excess of five times annual giving; therefore it is essential to explore the potential for major gifts early on.

**Table 1: High Level Roles and Responsibilities**

<b>Group or Team</b>	<b>Role</b>	<b>Notes and Comments</b>
Board and Ministers	<ul style="list-style-type: none"> <li>• Be vocal and visible supporters and proud and generous contributors commensurate with means</li> <li>• Recruit key leaders</li> <li>• Help identify and solicit lead donors</li> <li>• Arrange congregational votes at approval milestones</li> </ul>	<ul style="list-style-type: none"> <li>• Make the project and capital campaign a high priority for the board and congregation</li> <li>• Request initial congregational vote at the May 2015 Annual Meeting</li> </ul>
Steering Committee	<ul style="list-style-type: none"> <li>• Oversee and coordinate the entire effort</li> <li>• Ensure coherent messaging and communication plans across both teams</li> <li>• Provide a role for lead donors</li> </ul>	<ul style="list-style-type: none"> <li>• Involve people who are widely respected and trusted</li> </ul>

Group or Team	Role	Notes and Comments
	<ul style="list-style-type: none"> <li>• Ensure active and enthusiastic engagement with the congregation, including events, technology, tours, etc.</li> </ul>	
Building Team	<ul style="list-style-type: none"> <li>• Engage architect</li> <li>• Flesh out plans and link to mission/vision</li> <li>• Devise and carry out communication strategy to engage the congregation</li> <li>• Develop conceptual designs at three different price points</li> <li>• Review the three plans with the congregation and schedule a vote to select the preferred plan</li> <li>• Develop case statement for the preferred plan</li> <li>• Flesh out cost estimates</li> </ul>	<ul style="list-style-type: none"> <li>• Choose an architect who has experience working with churches and renovations, and can engage the congregation effectively</li> <li>• Seek to identify all cost elements and drivers from the outset</li> <li>• Explore samples from other congregations (consultant to assist)</li> </ul>
Finance Team	<ul style="list-style-type: none"> <li>• Begin early planning for the capital campaign – especially critical as a visiting stewardship infrastructure must be built from scratch</li> <li>• Analyze annual giving patterns to develop a thorough understanding of the potential donor base</li> <li>• Develop one or more essential gifts charts to show the range and number of contributions of various sizes that will be needed to reach specific goals</li> <li>• Begin identifying and engaging potential lead donors</li> <li>• Work with Finance and staff to ensure accurate and consistent pledge data</li> <li>• Work with the Building Team in advance of the Financial Feasibility Study (FFS) to ensure a strong case for capital campaign giving</li> <li>• Devise and carry out mechanisms for educating the congregation about capital campaign giving and sources of money; and for communicating early and often throughout the campaign</li> <li>• Arrange for the FFS, identify interviewees, assist with logistics</li> <li>• Conduct capital campaign assuming positive results of the FFS and congregational approval</li> </ul>	<ul style="list-style-type: none"> <li>• Consultant to assist in campaign planning</li> <li>• Assist in the effort to develop a long range financial plan per Recommendation #2, providing input on recurring cost implications of the building project.</li> <li>• Engage the ministers and board to approach potential lead donors (consultant to assist)</li> <li>• Communicate stories from other congregations about sources of capital campaign contributions (consultant to assist)</li> </ul>



Table 2 is high level schedule for pursuing the tasks that are on the critical path leading to the FFS and capital campaign. While it is an ambitious schedule, I suggest you start with it, refining it as necessary. You will have a more accurate timeline once you begin discussions with architects as they will help you determine what is reasonable given their work processes and staff availability.

**Table 2: Preliminary Schedule**

<b>Task</b>	<b>Target End Date</b>	<b>Notes</b>
Organize the three main teams, recruit chairs and co-chairs and core members, and develop charters	June 2015	It is vital to choose these key leaders wisely
Select and engage an architect	August 2015	Choosing an architect is an important decision so take time to do this with care and rigor. Obtain multiple proposals and consider how well each candidate understands your goals and how well he/she will work with the congregation. Check references and visit other church projects candidates have done.
Begin detailed plans for the capital campaign	Begin in September 2015 and continue until March 2016	Plan the details and schedule of the capital campaign and staff up a Capital Campaign Team. Consider several events (major donors in the Fall, whole congregation in Winter); outline logistics in detail; recruit many people, both for the leadership team and subgroups and for specific jobs (e.g., publication and publicity, technology, database, events/parties, team leaders). The more people who participate the better. Recruit many visiting stewards. Engage potential lead donors from the beginning.
Flesh out three options, tying them to the mission and vision, presenting them to the congregation for a preference vote	Preference vote October 2015	When asking architects for bids, ask them to propose a process and timeline for doing this. Be sure to allow enough time for congregational participation. Use the process to generate excitement and momentum and ensure broad understanding.

<b>Task</b>	<b>Target End Date</b>	<b>Notes</b>
Develop and communicate a compelling case, along with pretty good cost estimates, for the preferred option	Early November 2015	The case should explain clearly how the Congregation will be transformed for the better by this capital investment. This step is critical for a successful FFS, which gages how well people understand and support the project. Use a variety of mechanisms (online, 3-D models, renderings, walk-arounds) to communicate and engage.
Conduct FFS	November 2015	While advance planning and scheduling is needed, the study itself can be completed in three to four weeks
Assess and act on results of FFS	Early December 2015	Review and address any recommendations from the FFS (e.g., refining the project or additional engagement), and re-scale the project to likely available funds
Launch capital campaign	December 2015 (Early Phase) February 2016 (General Campaign)	Obtain congregational approval of the capital campaign
Finalize building and financial plans and financing	Spring 2016	Refinements based on final campaign results and refined financial plans, including potential for mortgage funds
Celebrate and begin construction!	Spring 2016	

#### ***4. Arrange for an outside audit***

While you have done much to strengthen your financial management and controls, it is important to engage an outside expert to conduct an independent audit of your finances including procedures and controls. This is an essential step in moving toward a successful capital campaign for two main reasons. First, current, accurate, and reliable financial and pledge data are needed for capital campaign analysis and planning. And second, an outside audit will increase confidence levels among members, especially important for approaching potential major donors. In short, the cost of an audit will be money well spent.

#### ***5. Conduct a thorough evaluation of the year-round pledging process***

Now that you are in your third year of the continuous pledging process, it is a good time to take stock of how effective it has been, in terms of financial results and engagement of congregants. Part of the assessment should be considering how to scale the process beyond what is currently possible with Rev. Gibbons hosting all of the dinners. The capital campaign process, which will entail visiting stewards, will provide an additional

data point about process, and may lead to innovative ideas for incorporating periodic one-on-one visits with the continuous pledging approach.

**6. *Promote planned giving, endowment, and strengthened stewardship***

Take advantage of the momentum of the capital campaign to encourage planned giving to increase the endowment and other permanent or long-term funds. Review the policy documents that govern the use of these funds and create a compelling case that motivates people to make legacy gifts. Develop and execute a plan for inviting and engaging people, considering written materials and small group gatherings focused on specific issues such as retirement and estate planning.

In the longer term, consider expanding your stewardship ministry to address other money-related issues of interest to congregants, viewing part of the mission of All Souls as helping members live their values through their spending, saving, and investment. Consider, for example, offering seminars on values-based budgeting, saving for college, life-long financial planning, and talking with children about money.

All of this, coupled with the capital campaign, is an opportunity to increase focus on the impact of finances on the life and long-term health of the Congregation. Capitalize on this to promote increased generosity and increased equity in your giving.

## **PROPOSED STEWARDSHIP CONSULTING SUPPORT**

Additional stewardship consulting at specific points in the process will prove valuable in helping you move forward. The next major component of stewardship consulting will be the Financial Feasibility Study to be conducted soon after the congregation has indicated a preference for a single building plan. The FFS will provide a more detailed assessment of readiness for the capital campaign for the specific plan and will provide a more refined estimate of how much money can be raised. It will also generate data about preferences and priorities that will be useful in refining the plans and the campaign messaging. It is based largely on confidential personal interviews with a sample of pledging households, drawn largely from the top three quartiles of annual contributors, and focuses on how well members understand the plan, how well they think it supports All Souls' mission and vision, and how much they are likely to contribute to a capital campaign for that specific plan.

In addition to the FFS, Stewardship Consulting should also be engaged to help with planning and execution of the campaign itself, beginning this coming summer. The scope of this work includes assistance with logistics, recruiting, and scheduling; review of communications plans and materials to help sharpen messaging; assistance in long-range financial planning; assistance in identifying and approaching potential major donors; and onsite training for the visiting stewards who will conduct the one-on-one stewardship visits to engage members and solicit financial commitments. It would also likely include helping in the assessment of your year-round pledging process.

The FFS will cost approximately \$10,000, including labor and expenses. This is based on an assumption of 30-35 in-person interviews conducted during a single visit, supplemented by limited surveying. During the FFS site visit, I would also meet with the various teams on early campaign planning and next steps. The product of the FFS is a written report in PowerPoint format accompanied by a presentation delivered via video conference.

The additional campaign support discussed above, including one more site visit for final planning and visiting steward training, would cost approximately \$4,000.

## **CLOSING**

I enjoyed my weekend with you very much and think it was successful in accomplishing your goals and generating energy and enthusiasm for the building plans and capital campaign. I am very impressed with how much you have accomplished so far, as well as the many strengths of All Souls that will surely provide a firm basis on which to conduct a successful campaign. The weekend provided strong indication that you are ready to move forward and engage with one another to develop an inspiring facility plan that will meet your needs for years to come, and to undertake a successful capital campaign to support the plan.

It has been a pleasure and an honor to be with you for the Next Steps Weekend, and I would welcome the chance to continue to work with you.

Faithfully submitted,



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**Appendix A**  
**Next Steps Weekend Schedule**  
**All Souls UU Kansas City, MO**  
**May 8-10, 2015**

<b>Friday Evening</b>	
3:30	Group meeting with staff (senior minister, minister of religious education, administrator, music director, ministerial intern, Simpson House coordinator, bookkeeper)
4:00	Half hour one-on-one meeting with Rev. Kendyl, Senior Minister
4:30	Facility tour with Lamar Hicks, Dori Bader, and Jane Wilson
5:30	Dinner with Feasibility Team, Renovation Concepts Team, Yvonne Jameson, Ruth Robarge, Rev. Gibbons and Mark Gibbons
<b>Saturday</b>	Small group meetings as follows:
9:00	<ul style="list-style-type: none"> <li>• Recent past presidents</li> </ul>
9:50	<ul style="list-style-type: none"> <li>• Finance, endowment, audit</li> </ul>
10:45	<ul style="list-style-type: none"> <li>• Facilities, grounds, maintenance</li> </ul>
11:40	<ul style="list-style-type: none"> <li>• Committee and team leaders representing committee on ministry, RE, social justice and MORE2, music, Demeters, caring team, fund raising, men's group</li> </ul>
12:30	Working lunch at church with the minister, board of trustees, and feasibility team
1:30	Open facilitated workshop for congregational leaders and any other interested congregants.
3:00	Informal review session of interim findings with Rev. Gibbons, Lamar Hicks, and Jane Wilson
<b>Sunday</b>	
11:15	Worship service devoted to Next Steps Weekend, including a reflection by Barry on stewardship and capital campaigns, a summary of Barry's report, and Q&A
12:30	Lunch meeting with board of trustees, Rev. Gibbons, and feasibility team to answer any remaining questions and to provide more specific, next-step recommendations.
1:30 PM	End of visit

**Appendix B**  
**Outline of Worship Service Remarks**  
**Barry Finkelstein, May 10, 2015**

**1. Mini-sermon Part 1:**

- Intro – My background and All Souls Next Steps Weekend. Met with over 50 people.
- Stewardship as my ministry – love visiting with UU congregations and talking about money. Why? I think about the impact we UUs have had on issues like marriage equality, civil rights, welcoming congregation, green sanctuary, immigration, economic justice. As a small denomination, we have had and continue to have outsized impact. In addition, think about the value of this congregation to each of you on a personal level. I heard incredibly moving and powerful stories over the weekend about lives transformed and people lovingly supported here. This is your community, your home, and it has been this way for generations.
- Imagine how much we could accomplish with additional resources. Like many of our congregations, you struggle to fund operations and to afford sufficient staff and resources to carry out the full breadth of your mission and programming. That’s why I work on stewardship – to help you and other UU congregations take our value proposition to the next level, to commit a higher level of resources so we can have even greater impact.
- Definition of stewardship – from Wikipedia: *“Taking care of something one does not own.”* Stewardship is how we marshal and focus our resources toward our agreed-upon mission and goals.
- Especially love capital campaigns – once a generation opportunity to give back and invest in the future. Easier to talk with people about capital campaigns as they are future-oriented and one-time, unique, legacy, invite thinking big.
- More important, a major facility project and capital campaign challenge us to be our best; to treat one another with kindness, open minds, open hearts, and perhaps most important, open ears. While you have made the major decision to stay, there will be many more decisions, plus an obligation to reach out to people opposed, to keep the congregation whole. You can do this – in part by embracing the learnings from your recent turmoil and conflict. You can come together and build.

**2. Shift gears to my report summary**

**3. Closing – Mini-sermon Part 2**

- Look around at this place and your fellow congregants. Think about the leaps of faith that brought us to this place and time. 150 years! You have been working now productively and effectively to envision the next several years. You are ready to take the next leap of faith and do your part.
- I ask you – is there a better investment you can make? Is there a better way to use your financial resources to promote your deepest values?
- Quote Daniel Burnham, urban planner: “Make no little plans; they have no magic to stir men's blood and probably themselves will not be realized.” So go forth and make big plans.

## Appendix C Next Steps Weekend Survey Questionnaire

Please use 3-5 word answers for Questions 1, 3, and 4.

1. What are three defining milestones or events in this congregation's history?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

2. Please complete the following sentence by circling one option below: Over the next five years, I would like to see our membership experience the following annual growth rate:

1. no numerical growth.
2. 5 percent annual increase in membership.
3. 10 percent annual increase in membership.
4. 15 percent annual increase in membership.
5. greater than 15% annual increase in membership.

3. What are the three greatest strengths of this congregation?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

4. What are the three most important challenges this congregation needs to address in the next five years?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Appendix D Survey Results (36 Respondents)

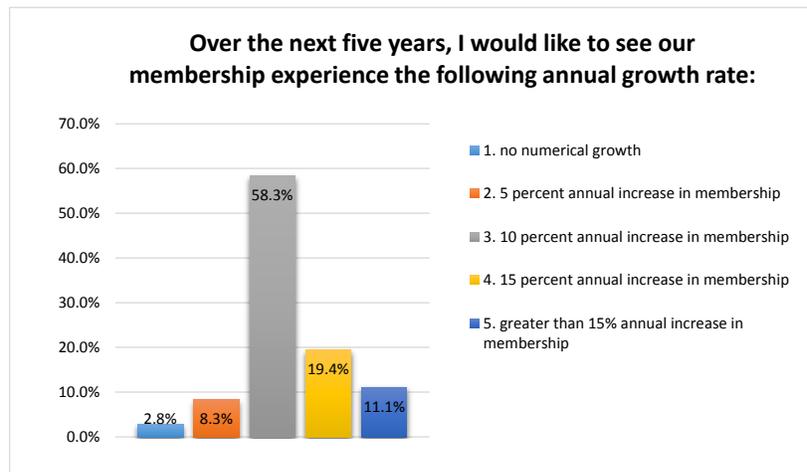
### 1. Milestones

Response	Number
Rev. Bragg’s ministry (1952-1973), establishment of humanist tradition, Humanist Manifesto	17
Recent interim ministry conflict, schism, and recovery/rebuilding	11
Move to current location in cultural center, 1950s fire and relocation, building after former building burned down, building main church and education wing in the 1960s, construction of current building (1960s and 90s)	10
Calling Rev. Kendyl Gibbons, restoring equilibrium, transition to Kendyl’s ministry	9
Founding 150 years ago	5
Purchase of Simpson House	5
Becoming a Welcoming Congregation, LGBT support	4
Facility renovation following 1998 capital campaign	4
Recent ministries (Revs. Eller, Brooks, Gibbons), 10 years of Rev Eller’s ministry, early long-tenured ministers set church culture and style	3

### 2. Growth Preference (Annual)

Over the next five years, I would like to see our membership experience the following annual growth rate:

Answer Options	Response Percent	Response Count
1. no numerical growth	2.8%	1
2. 5 percent annual increase in membership	8.3%	3
3. 10 percent annual increase in membership	58.3%	21
4. 15 percent annual increase in membership	19.4%	7
5. greater than 15% annual increase in membership	11.1%	4
<i>answered question</i>		<b>36</b>
<i>skipped question</i>		<b>0</b>



### 3. Strengths

Response	Number
<b>Social justice work:</b> Community involvement, social justice work, ecumenical engagement, membership in MORE 2, put our beliefs into action, live our values, activism for human rights for all, community leadership	17
<b>The people</b> -- intellectually curious, tenacious, stimulating, interesting active members, good caring people, intelligent, talents, resilience, creative	17
<b>Location</b> – centrally located in a prominent and desirable part of the city	11
<b>Welcoming community</b> , open to diversity of thought and outlook, open to all, intellectual openness, non-judgmental, open-mindedness and diversity	10
<b>Committed, caring congregation:</b> Caring community, sense of community, bonds among members of 30 years and more, committed congregation, supportive culture	8
<b>Liberal group</b> in a conservative geography, liberal beacon, liberal kindred spirits, liberal faith, forward thinking, liberal presence in the community, home for religious liberals	8
<b>Our important message:</b> UU beliefs, heartfelt thinking on ethics and religion, free and open beliefs, spiritual maturity, encouragement of free analytical thought, intellectually stimulating and spiritually inspiring, pride in identity	7
<b>Religious Education</b> for all ages, strong RE program, nurturing environment for children	7
<b>Music program</b>	7
<b>Rev. Kendyl</b> , strong ministerial staff, intellectually stimulating sermons	5

Others mentioned are: endowment, staff, historical heritage/legacy (e.g., Rev Bragg's ministry), opportunity for spiritual growth, the Forum, willingness to explore change and ability to change, contemporary art and music hub, and opportunities for learning, fellowship, and fun.

#### 4. Challenges

Response	Number
<b>Membership growth</b> , attracting, engaging and keeping new members, improving ability to approach and engage visitors, integrating people into membership, removing exclusive attitude toward new people, welcoming diversity of belief, increasing attendance	20
<b>Finances and generosity</b> : Increasing enthusiasm for giving and financial support, revenue growth, realism about budgets, increasing giving base, increase revenue to equal expenses, funding our mission and outreach, pay UUA dues annually, investment management and use of endowment	18
<b>Addressing facility shortcomings</b> : successful capital campaign, financing building repairs, facility renovation, adapting the building to meet programming needs, better physical space, navigating building improvements, expansion and maintenance of facility, accessibility, building falling apart, remodel, repair, expand, attractive up-to-date aesthetics	17
<b>Ageing congregation</b> : Change to attract and keep young families; Reach out and attract younger members; Generational transition and leadership succession, adding staff and programs to appeal to younger members, lower average age, migrate young parents from RE, newcomers into leadership, need more younger members and families, attract and retain young adults, be relevant to all ages	16
<b>Focus on mission in the community</b> : Service to the larger community, sustaining social justice work, outreach and visibility, strengthening on-site community outreach, more emphasis on social justice, greater community voice for social justice, living our values without hypocrisy	10
<b>Constraints of present location</b> , Parking (most often mentioned constraint)	8
<b>Growing volunteer base, developing leadership</b> , same old same old leaders, leaders having trouble letting go and cultivating new leaders, self-satisfied leaders, burnout, lack of structure in operations	7

Other challenges mentioned by at least two people are: technology and communication to engage to hold members, involvement as host city for 2018 General Assembly and 150 year celebration, and spawning satellite congregations.

**APPENDIX E**

**SUMMARY LEVEL TEMPLATE FOR STRATEGIC FINANCIAL/RESOURCE PLANNING\***

	YEAR-2	YEAR-1	CURRENT	YEAR+1	YEAR+2	YEAR+3	YEAR+4	YEAR+5
Number of members								
Number of donor households								
Average annual financial commitment (pledge)								
Total financial commitments								
Other revenue (itemize major sources and amounts)								
<b>Total Revenue</b>								
Staffing – number and details								
Payroll expense								
Debt service								
Contribution to reserves								
Generosity (social justice, denominational connection, etc.)								
Other expenses (itemize facility costs and other major cost elements)								
<b>Total Operating Expenses</b>								
<b>NET INCOME/LOSS</b>								
Average adult Sunday attendance (worship service and forum)								
RE enrollment								
Average RE attendance								
# Classrooms needed								
Long-term funds balances (itemize endowments, trusts, etc.)								
Other key parameters (e.g., parking spaces)								

\* Note: rows may be tailored to your needs, and plans may extend beyond 5 years. Details may be itemized on subsidiary sheets/schedules.

