

## **Stewardship Campaign for Operating Funds for 2017 - 18**

### **Summary of Campaign**

In November, 2016 following the Presidential election, the Stewardship Team developed the strategy and tactics for the campaign. With the climate post-election, the Team conducted focus groups of high pledgers to test messages and targets. The focus groups were very positive, and we were encouraged to raise our already bold target of \$1 million to \$1.1 million.

The campaign kicked off in February, 2017 and formally closed mid-March. Active pursuit of tardy pledgers continued into June.

A number of older members died during 2016. Among them were some of our highest pledgers. Replacing their generosity will not happen overnight, though membership has grown by 36 people since November, 2016. And, most of the new members pledged, several making quite significant initial pledges.

That said, the campaign was unable to hit our (too) bold target. The total pledged, as of 6/26/17 was \$901,807.

Average pledge amount increased by 9.7%. According to Sara Deshler, this is the best in two years for this point in time. It should be considered remarkable in light of many churches struggling to stay even. Though our total fell short, our efforts were successful in this regard.

The following is an [annotated](#) edition of the campaign strategy document, with [notes regarding execution](#) of proposed activities. At the end are a number of recommendations for future campaigns.

This report and the original strategy document were drafted by Mary Means, co-chair, Stewardship Team 2016-17.

### ***Strategy***

Our message needs to be bold. The focus groups confirmed this. In the wake of the election there's widespread anxiety, depression, and pain. Already our leaders are working on strategies to increase the ways in which Cedar Lane does worship, pastoral care, social justice and environmental action. This is a golden opportunity that we must take advantage of. Members know that people -- our members, visitors, and all who are or will be impacted by emerging threats to everything we have worked for most of our lives -- need Cedar Lane to be there for them. The messaging needs to center on real people

doing real things that are making a difference in others' lives. And on what is possible once we have the resources.

*Execution:* We did this only through the 6 pulpit testimonials (2 x 3 Sundays). Hindsight: we could have posted short stories of people via FB or in weekly eNews, too. Would have required more work than we had bandwidth for.

**Theme: *The Time Is Now.***

Lends itself to repetitive expressions, examples:

- ... to be there for Cedar Lane.
- ...to be able to be all we can be in this broken world.
- ...to shift gears and become the church we aspire to be, to live our vision
- Now is urgent: all around us our immigrant neighbors live in fear. We must respond.
- Now is urgent: we need the spiritual support and caring of Cedar Lane as never before.

**Guiding Principles**

- Our events must be first rate and well promoted.
- Our participation in worship services (testimonials) must be passionate and moving.
- Our ask must be bold, it must challenge everyone to rise to the occasion.
- Set the target -- \$1.1 million, tell people why and what meeting it will enable. Visually report progress weekly.

**Timing:** by Kickoff, obtain increased pledges from all top donors, Board, Stewardship Team, Ministry Team leaders. Be able to announce the amount pledged already. Challenge everyone to increase their pledge by 10% over last year. New members: start with fair share guide -- and go higher if possible.

*Execution:* This took persistence, but it worked. We achieved near 100% participation by key pledgers by kickoff. Several new members began with four figure pledges, in one case a pledge of \$4500.

**Stewardship Team Meetings**

Stewardship Team's regular monthly meeting is 4<sup>th</sup> Tuesday. Beginning Dec 16, co-chairs were meeting for coffee weekly on Fridays. Any team member who could was invited. Task teams interacted as needed, led by task leader, communicated to co-chairs weekly and as needed.

*Execution:* Sticking with a regular monthly slot proved unworkable, due to conflicts. This is why we began weekly co-chairs meeting, frequent email updates. Later in the campaign, several of us met via Zoom, which worked well.

**Components of the Campaign**

*Communication Materials:* all using a unified graphic look, and with unified messaging

- Brochure, pledge card
- Webpage
- Pulpit testimonials (2 per service, 10 services)
- Video reflecting the range of Cedar Laners
- Posters
- Nametag stickers for pledgers

- Banner across main entrance, side entrance
- Updates weekly in Order of Celebration, eNews.
- eBlast just before 2/25 event, last week of campaign

*Execution:* We invested in professionally designed materials, which were beautiful. Many people commented on them. At least one person felt CL finally had a campaign after many years.

### **Conversations / Stewards**

- Have at least two Stewardship Team members at our table in Lounge between all services.
- Visiting Stewards: 40 volunteers trained to meet personally with 3-5 members
- Mark Ewart to train volunteers on Friday evening Feb 10, Saturday morning Feb 11
- Senior Minister and Campaign Leaders meet personally with top donors in January, early Feb. prior to kickoff

*Execution:* We achieved about 30 trained Visiting Stewards. Some were diligent and very effective, others did not follow through or got around to it only as the campaign was winding up. Poor reporting back. It took big effort to track down some 'no-show' Visiting Stewards. Every member of the congregation will be visited during next year's joint capital and operating budget campaign. Klote will train and coach many of us. This should help lower resistance to be a visiting steward. How to get visiting stewards to honor their commitments may continue to be a challenge.

### **Key Dates and Events**

Plan events with a goal of engaging a range of Cedar Laners, some top donors, some emerging leaders, some young adults. Tactics:

- *Feb 11. VIP Reception.* Jim Key, UUA Moderator, is our distinguished guest. Venue fits max of 40 people.

*Execution:* Event went well, Jim Key, Abhi were inspirational. We reviewed the campaign goal, events, how having the resources would enable CL to be nimble in responding to unprecedented times. A couple of revered leaders made impromptu testimonials. People were asked to pledge right away so the campaign would kick off boldly. Most of them did so.

- *Feb 19. Kickoff Sunday.* Day after Seminary for the Day with Rev. Jacqui Lewis. Abhi is planning a vigorous Sunday service. No testimonial on this Sunday. Stewardship Team present for both services, wearing distinctive hats or sashes.
- *Feb 25. The Time is Now... for Wine, Cheese and Fun!* Cabaret-like event featuring talented young actors and comics. Held in sanctuary with cabaret tables and chairs, lively decorations, including campaign banner. Provide childcare, pitch to younger, newer members while hoping it will have wide appeal for all.

*Execution:* This was a well-received, well-attended event that did achieve a wider range of participants, including younger folks. At the event, we could have made a stronger pitch or connection with the pledge drive.

- *Testimonials at Worship Services.* Line up 20 members -- reflecting our diversity. Work with them to create powerful statements. Two testimonials per service Feb 25 through Mar 19.

*Execution:* Turns out we could have only 1 testimonial per service for 3 Sundays. Decided to have a range -- from young adult making first pledge, to a 90 yr old active for more than 50 yrs. Testimonials 2017: Regina and Eric Dull, Stephanie Williams (young adult, first pledge), Rich Madaleno, Yuka Fujikura (50 yrs a member), Laura Hinds and Rob Laws (new members), Iris Munoz Peters (new member, immigrant, first pledge),

- *March 19. Commitment Sunday.* Stewardship Team work with Abhi and worship team to produce exciting celebratory component of service, can it be an all-ages service, with youth and kids as ushers?

### **Communications**

All print materials to have unified look while avoiding appearance of being expensive to produce. Softly introduce new CL graphic identity.

*Brochure* to be 8.5 x 11 or 5.25 x 8.5, 8pp incl cover. Mail in large distinctive envelope with pledge card, return envelope.

- Lots of pictures, captions conveying that Cedar Lane serves us all, and we live our faith in action at all ages. Brief narrative relates our Vision and what we are called to be in these challenging times. Short descriptions / "what if we could" examples of how we will be able to do more when we meet the campaign challenge, when we commit ourselves to generosity.
- Pie charts of where our dollars come from, where they go: operating budget, share the plate. Consider not showing the dollars, but %. Cost of running CL for a week?
- Brochure / pledge package to include chart of fair share, and examples of ways to approach it. Idea: Have a chart of what a monthly sum represents at x level, y level (ex: Dinner for 2 and a movie. Instead, eat at home, Netflix) (new car = \$300 monthly payment. Instead: get another year out of old one) etc. Brochure also to include list of creative ways to optimize tax advantage.

*Execution:* Graphic designer Katherine Lenard, who did Cedar Lane's new graphic look, created a handsome package, including the flame-ometer. Many compliments on the materials, the clarity of where the \$ goes.

*Video* -- Cathy Grubman to produce it. 3-4 min. Shooting on Sunday Jan 22. Complete by Feb 10. Strong, featuring range of members including our last living founding member and her son, a former board president. Young parents, etc. Intent is that it will serve the campaign well, also be useful post campaign on the website.

*Execution:* This worked, thanks to a virtually pro bono film maker from UU Church of Arlington, for it took a lot more work than anticipated. We asked: "Tell us in a few words why CL is important to you." Next time we'll add "and why you pledge generously." Members like the video, it's on our website and has a long shelf life.

*Video testimonials* -- Film our speakers and edit a few of them for website, Facebook.

*Execution:* This did not happen. Worship services are filmed, but we are not set up to edit out just the testimonial clip. We lacked the trained volunteers and software, and did not plan ahead

to enable this to happen. AV crew has since acquired the software and is training some volunteers to use it. This has possibilities next time, if planned for in advance.

*Website* -- lots of photos, brief statement making the case for Why The Time is Now. What it will enable us to do more of, do better, do new -- to meet challenges all around us. Update weekly with progress graphic and headline. Links to FAQ, creative approaches to tax planning, etc.

*Execution:* Though we produced a weekly update in eNews and OOC, we did not utilize the website well. Did not plan ahead to enable this to happen. But were prominently in eNews weekly through mid-April.

*Bulletin Board "Campaign Corner"* with progress visual (chalice with flame growing bigger?) and photos of testimonial folks with big quote re why they give. Can we do this in RE area, too?

*Execution:* We had a large flame-ometer poster at the rear of the sanctuary. On it, tiny flame stickers increased in number and height as pledging grew. People liked it a lot, commented on it. Photo of the flame-ometer was in several eNews campaign update / reminders.

*Order of Celebration*-- save the dates and short weekly updates.

*Acknowledgements* -- post-Commitment Sunday, email of thanks sent to each pledger from Stewardship Team. Post-Campaign article on Campaign results in June Newsletter (deadline mid-May).

*Execution:* Turns out the tradition at Cedar Lane is a hand written note card. Several team members did batches of them, finally engaged the volunteers who staff the office reception area after doing hundreds. This is of limited value. It should be replaced by an attractive electronic acknowledgement.

## **Managing the Campaign**

Each Task Team has a Stewardship Team task leader:

- Campaign Communication Materials -- Mary. Recruit vols to help with video interview scheduling, rough edit
- VIP Event -- Debbie Trent. Arrange venue, coordinate with party host, providers of food and drink.
- Visiting Stewards -- Mike Benefiel. Recruit 40+ persons, communicate with them about training. Serve as point person for distributing names/contacts to them, reminding them, receiving their post-visit notes (these should be entered into ACS).

*Execution:* Need greater clarity about expectations for team member responsible for this. Beyond recruiting, most of this fell to another team member. It is a very labor intensive task.

- Testimonials -- Pratima? (as of 12/16 40+ potential candidates identified for live or video). Recruit 20 eloquent persons, coordinate scheduling and messages with them.
- Cabaret party -- Stew Coordinate talent, recruit crew of vols to help with logistics of event, food, drink, set up, tear down, etc.
- Coordination / Tracking\* of progress, assuring follow up contacting members, etc.

*Execution:* Some of this was done, did not appear to have had a system or sense that having this info would be useful. Staff provided print outs weekly or on request, but the reporting formats are of limited value. See recommendations later in this report.

Stewardship Team leaders are to recruit helpers to share the work and to expand the number of volunteers working on the campaign.

*Execution:* Task leaders had limited success recruiting helpers. Worked best for Cabaret, some success with Visiting Stewards. Most of the work fell to a few Stewardship Team members.

### **What is Needed From Whom, By When**

*Board:* all volunteer to be Visiting Stewards, attend training Feb 10-11. All make pledges early, by Feb 18 and campaign kickoff. All commit to increasing pledges over last year, preferably by 10%. All stay on positive message about Cedar Lane's financial condition throughout the campaign.

*Execution:* Most board members did volunteer for training, all made their pledges by kickoff, most increased as requested. Some also volunteered to help with thank yous.

*Abhi* -- participate in conversations with top quartile members in January to obtain increased pledges prior to kickoff. Participate in VIP reception and other key events. Preach mightily about generosity!

*Sara Davidson* -- With appropriate notice, give priority attention to time-sensitive Stewardship communication needs in eNews, OOC, etc. through Mar 25.

*Execution:* Sara Davidson was terrific. Stewardship coverage was consistent through April. Mary made sure to write short pieces by Sara's deadlines.

*Stewardship Team:* All make their pledges prior to campaign kickoff, preferably at a level at least 10% over last year if possible. All pitch in for Lounge coverage, presence in Sanctuary during worship (distributing pledge stickers for nametags of pledgers, etc.). Team task leaders: recruit helpers, stay on top of schedules, report delays or issues promptly to Stew and Mary. All Team members attend Sunday worship service as often as possible during campaign.

*Execution:* All team members made their pledges early and increased. However, team was too small. With one person out for medical reasons, and others busy with non-Stewardship involvements, much of the work fell to 2-3 people. Need larger team, streamlined systems, more staff help and less labor intensive methods.

### **Post Campaign**

Stewardship Team will make a report to Board, and to congregation. For the record, prepare summary of campaign strategy vs actual actions [that is this document], what worked well, what not to do again, what to change next time. Create permanent digital file on CLUUC server for main campaign documents, vendors, forms, etc., so future campaign teams can get off to a good start.

This strategy document created 12/16/16. MM "*Execution*" comments added 5/22/2017, 6/16/2017.

## **Addendum / Comment Post Campaign**

**Chasing People Down.** What was not planned in advance was the pursuit strategy -- for persons who for whatever reason did not make their pledges by the end of the formal campaign. Roughly 1/3 of the pledged revenue came from this cohort, but the effort to get them to pledge was huge. Stewardship veterans had warned this would be the case, yet a pursuit strategy was only developed after the formal close of the campaign. The campaign officially closed Mar 19, the pursuit continued for the next 10 weeks. Repeated emails, eNews reminders, and finally phone calls, which largely went to voicemail. A technique that seemed to work was to send the person an email right after leaving a VM, telling them the gist of the VM and encouraging prompt response. This often prodded them into action.

This year, with volunteers from the Board and other lay leaders, we managed to call nearly everyone who had not pledged, even those whose pledging is below \$500.

Stewardship Team prepared a letter from Rev. Abhi which went to higher pledgers who were late in pledging. This did trigger most of them to pledge.

Still, staff noted in late May that it would appear that the campaign mailing (Feb 15) had not been sent to a number of people on a Religious Education list, nor to several new members. How did this happen? Who is responsible for maintaining an accurate contact list for all members and friends? Is there one list or are there several? The end of the campaign is not the time to be asking this.

**Staff are surprisingly passive when it comes to the pledge drive.** It would seem the assumption was that the volunteers knew the ropes, the volunteers would do virtually everything. There was no orientation offered, though the most active of the two co-chairs was a novice to stewardship and a relatively new member by Cedar Lane standards. With 75% of the church's revenue coming via pledges, the staff need to be much more proactive, supportive of volunteers.

## **RECOMMENDATIONS**

**Legacy practices need to be revisited.** For instance, hand written thank you notes are very, very labor intensive. When asked if the volunteers who sit at the office reception desk could do some, staff initially said they had declined in the past. Yet, when the volunteer crew leader was asked, they readily agreed. After tired Stewardship Team members had written several hundred. Perhaps it is time to switch to an electronic acknowledgement that includes the amount pledged and the method chosen to honor it.

**Policy on Pledging as Pre-requisite to Enroll Child in RE.** After weeks of chasing non-pledgers, we learned that 59 RE parents had not pledged. This is unfair and unacceptable. On 6/15 they were sent a complete packet with pledge card and special letter asking that they pledge. The Board should consider a policy such as:

*Parents of children enrolled in Religious Education are expected to make a pledge towards the church's operating budget each year, whether they have joined as members or not. A minimum pledge of \$300 per child is recommended, partly to defray costs of providing 40 weeks of quality religious education. Persons for whom this is not possible may contact Rev. Abhi for a waiver.*

Were such a policy in force, the campaign would have raised at least an additional \$17,000 for next year.

**Better collection / use of data.** An explicit tracking effort is needed during and post-campaign to tally pledged amounts weekly, make sure “visual progress” is updated, tracking response of those who met with visiting steward vs those who did not. Tracking (number of pledges returned within first week after mailing and in subsequent weeks, # of online vs mail in vs Sunday turn in, vs response to an email reminder, etc.), conducting post-campaign survey of pledgers: what went well about campaign(including visiting steward), what did not, suggestions). As Klote teaches us how to run a better campaign, perhaps he can help us set up a system that lets us better collect and mine data.

**Produce an “Owner’s Manual” for Stewardship.** It would appear that there is not a hard file in a central location. Staff need to play an active role in creating and maintaining a central file for stewardship campaigns. An “owner’s manual” for the stewardship campaign is needed. The Google Docs file is not well organized and consists of individual documents, sometimes drafts rather than final, incomplete lists of who did pulpit testimonials, for instance. Prior to 2016-17, there would not appear to have been a written campaign strategy and plan. A previous chair provided documents in May that might have been useful 8 months earlier. Team leaders are drafting an owner’s manual, to capture insights, though with James Klote & Associates running both capital and operating budget campaigns next year, the draft manual will need to be revised to reflect learnings gained from Klote.