Next Steps Weekend Report
&
Board Priorities

Thomas Jefferson Memorial Church-
Unitarian Universalist

Presented to Congregation Nov 12 2017

Presentation to Congregation

- Present findings of Next Steps Weekend report
- Introduce Board 2017-18 priorities
- Q&A

Next Steps Consulting Engagement

- Goal: Assess stewardship at TJMC & consider possible capital campaign
- Consultant: Mark Ewert, *Stewardship for Us*

Next Steps Weekend Process

- Church provided extensive data and documents
- Mark met with many individuals and groups throughout church
- Attended a Sunday service
- Delivered findings in report to Board of Trustees

THANK YOU to everyone who participated!

Mark met with about 75 church members, most of the staff, and attended our highest-profile service of the year. · Groups represented include: Buildings & Grounds Committee · racial and social justice committees · people involved in community outreach · Finance Committee · youth · people who have served on Pledge Drive and Stewardship teams · Worship Weavers · new members · elders · Membership Committee · Committee on the Ministry · people participating in covenant groups · Religious Education Committee · CareNet and Pastoral Associates · ordained ministerial staff & other professional staff · Board of Trustees

Findings: Metrics

- Members: 416
- Annual pledging: $363K
- Small endowment: $329K
- Long-term debt: none
- Last capital campaign: 1993, for social hall & church offices

Findings: Annual Financial Giving

- Average commitment $1,325; median $685 (excludes $0)
- Far below other *Stewardship for Us* client churches
- Too much of budget being carried by few large pledgers
- Decline over past four years
- Should not do away with annual pledge drive when trying to grow stewardship

Findings: Other Fundraising

- Events create risk around a specific date, generally do not raise much
- Exchanges for services/goods can distract from idea that annual giving is vital to church life

Strengths

- Children’s religious education program
- Pastoral care
- Buildings & grounds are well cared for
- Quality of worship and music on an upswing

Strengths

- Stewardship leaders are thoughtful, spirited, knowledgeable; pledge drives are well run
- Covenant groups/small group ministries
- Skilled Worship Weavers

Other Commendations

- Response to summer rallies was energetic and effective
- Board is thoughtful and dedicated

Opportunities

- Opportunity to serve community, spur significant growth
- This summer shows we have a deeper level of resourcefulness, resilience, and capability
- Our volunteer and financial capacity both probably much higher than current levels.

Opportunities

- Adding resources to support stewardship and membership
- Financial giving provides opportunities to create meaning, increase sense of belonging, & align values with resources
- Working to understand readiness steps for a future capital campaign

Challenges

- Declining pledging
- Low volunteer support outside of core group; some members participate minimally/not at all
- Hard time filling key roles
- No planned giving program

Challenges

- Board wrestling with its role vis a vis staff & places where volunteers cannot or should not be used for key tasks
- Frustrations about staff responsiveness, access to systems, difficulty getting things done
- Shared leadership among senior staff has been source of friction for congregation

Recommendations

- Work on restoring trust
- Review staffing plan and structure
- Incorporate better volunteer management practices
- Seek outside support to strengthen stewardship

Recommendations

- Better electronic giving
- Work on congregation’s vision
- Revise bylaws and policies to be clearer, in line with how we expect the church to work

Board 2017-18 Priorities: Guiding Documents

- 2012 staffing report
- 2015 long range plan
- 2016 statement of public witness on racial justice
- Next Steps Weekend recommendations

Board 2017-18 Goals

- **Vision**: Develop and share church vision in effective ways
- **Stewardship**: Increase understanding that all TJMC members are responsible for its well-being
- **Trust**: Strengthen relationships between congregants, between board & congregation
- **Racial Justice**: Lead TJMC's work inside & outside our walls
- **Administration**: Ensure infrastructure can meet our needs
- **75th Anniversary**: Create a fun and meaningful celebration

Goal: Vision

- Better articulate our current vision
- Administer congregational survey
- Later: Start planning for visioning process/strategic plan

Goal: Stewardship

- Exceed expectations on closing $50K budget gap
- New stewardship position
- Member expectations/healthy stewardship culture
- This year’s pledge drive
- Later: Create 2018-19 budget

Goal: Trust

- Report to congregation re: Next Steps & board priorities
- Clear, open, and effective communications
- Reach out to UUA resources for support
- Ongoing: Develop understanding in congregation about senior staff model

Goal: Racial Justice

- Lead congregation
- Support racial justice committee & staff in their work
- Increase our own understanding of white supremacy culture/governance
- Ongoing: Continue to be leaders in community

Goal: Administration

- Complete and approve governance bylaw changes
- Develop staff priorities and clarify responsibilities
- Work with COM, Personnel, Nominating, Membership to clarify roles and promote engagement
- Later: Board governance transition plan

Goal: 75th Anniversary

- Create planning team
- Feb/Mar: 75th anniversary celebration

Thank you for attending!

Questions?