



New Home Envisioning Weekend Report

River of Grass Unitarian Universalist Congregation

11850 State Road 84, #1

Davie, FL 33325

Prepared by

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INTRODUCTION AND SUMMARY

This report presents the results of a New Home Envisioning Weekend engagement with the River of Grass Unitarian Universalist Congregation. The project was conducted by Barry Finkelstein, a Unitarian Universalist (UU) Congregational Stewardship Consultant with *Stewardship for Us*. This report is based primarily on an intensive weekend on site, March 1-3, 2019, along with pre- and post-analysis.

Goals for Stewardship Consulting

The primary goals of the Congregation in engaging a stewardship consultant were:

- Engage with our congregation regarding future home visions
- Facilitate effectively, in order to really understand
- Assemble and present observations and go-forward recommendations.

Highlights of Results and Recommendations

The major result of the process is that River of Grass is ready to move toward a successful relocation effort and capital campaign to finance the investment in a new facility. The Congregation has many assets and strengths to build on, along with challenges that can be addressed as part of the campaign planning and execution.

The following recommendations will position River of Grass UU for moving toward its goals:

- ***Reach agreement on approach:*** carry out a rapid process to explore and reach a firm agreement on the kind of facility solution you are seeking, whether that is purchasing a permanent home, sharing space with another entity, staying in your current location or finding another long-term lease.
- ***Organize for the work ahead:*** Establish a Steering Committee and three focused teams to move the process forward.
- ***Define your dream facility:*** Formulate a vision of the future for River of Grass UU and identify alternative facility concepts that would support that vision; engage the congregation, and adopt a preferred alternative on which to base the capital campaign.
- ***Develop a long-range financial and resource plan:*** Identify the resources needed to support the hoped-for move to a new location as well as sustainable annual operations over the next five years.
- ***Plan and carry out a combined annual/capital campaign:*** Conduct a successful combined annual/capital campaign, targeting Winter/Spring 2019-20. Major steps include a financial feasibility study, detailed communication planning and execution, making the campaign a Congregation-wide priority and building and sustaining momentum and enthusiasm.
- ***Other actions to shore up finances and stewardship:*** Arrange for an outside review, adopt a policy on giving to the capital campaign, continue to make it easy to give.

In addition, continue to talk with one another about your dreams for the future and the money it will take to make those dreams a reality – build on the Weekend’s conversations going forward.

The balance of this report describes the Weekend process and provides more detail about findings and recommendations. Several appendices provide additional information.

BACKGROUND

Basic Data

Name and Mailing Address of Congregation	River of Grass Unitarian Universalist Congregation 11850 State Road 84, #1 Davie, FL 33325
Website Address	www.riverofgrassuu.org
Dates of Visit	March 1-3, 2019
Minister/Program Staff	Rev. Amy Carol Webb, Minister Karen Gonzalez, Religious Educator Sandy Chibnick, Administrator
Points of Contact	Scott May, President
Other Leader(s)	Rita Cherubini, Vice President Brit Lundell, Treasurer
Number of Members	128
Children & Youth Registered for RE	43 (higher than usual this year because of OWL which attracts outside participants)
Fiscal Year	July 1 to June 30
Annual Operating Budget	\$310,000 (expense), \$258,000 (income)
Annual Financial Commitments (FY19 Pledges)	\$200,000 = 66% of operating expenses; 80 pledging households
Average Financial Commitment	Mean: \$2,459 Median: \$1,000 80 TH Percentile: \$3,600
Endowment, Trust or Other Long-term Funds:	\$750,000, capital fund, separate corporation
Other Assets (Operating Reserves)	\$120,000
Approach to Annual Budget Drive	Commitment Sunday
Most Recent Capital Campaign	2003 to purchase property: Goal: \$400,000, raised \$374,000. Only some collected, then cancelled

Advance Contacts and Preparation

In advance of the weekend visit, Barry had several email exchanges and telephone calls with River of Grass UU lay leaders and Rev. Amy Carol Webb, Minister. He spoke with Connie Goodbread of the UUA Southern Region. He reviewed and analyzed extensive materials provided by the Congregation, including information on finances, stewardship and pledges, history, ministries, and activities. He reviewed additional materials in recent annual reports and on the Congregation website.

Historical Context

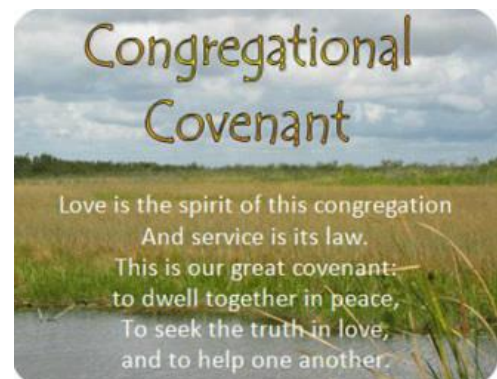
River of Grass UU just celebrated its 20th anniversary in February 2019, and the Congregation has come a long way in just 20 years. Among the historical highlights are:

- Following initial work begun in 1996, River of Grass UU was formerly established with a Charter Sunday on February 21, 1999, with 70 charter members, several of whom remain to this day.
- Rev. Ken Beldon was assigned by the UUA as a new congregation minister, arriving in 1998. Rev. Ken remained until 2005, by which time River of Grass had grown to 160 members.
- Welcoming Congregation status was attained in 2002, and a Covenant of Right Relations adopted in 2010.
- River of Grass UU purchased a 4.6 acre property in 2002 and conducted a capital campaign to build a sanctuary, while the congregation continued to rent space. In 2006, the Congregation sold the property yielding a net profit of almost \$800,000, creating the foundation for today's financial assets. River of Grass moved into its current location in 2011 and recently renewed its lease for three more years, during which it hopes to be positioned to move to space that better accommodates its mission and allows growth.
- After a difficult settled ministry, two interims, and a period of being lay-led, the Congregation engaged Rev. Amy, initially quarter time, building up to a full-time call in 2014.

Despite some bumps in the road, River of Grass has built a full-service UU congregation with an excellent full-time minister and part-time program staff, a dedicated 24x7 facility that it has spruced up to function well while having the feel of sacred space, a strong community and lay leaders, and substantial financial assets. Looking forward, you have set the stage for continued excellence and growth. You have chosen intentionally to invest a portion of your assets in strong staff and programs, most recently bringing on a dynamic Director of religious Education. You have recently begun conversations around the possibilities of a future home, what it would mean for River of Grass, and what it will take to get there. All of this will serve as a springboard to the future.

Mission and Covenant

Mission: River of Grass UU is committed to healing injustice and creating a sustainable earth while honoring each individual's search for truth, meaning, and faith.



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 met with approximately 47 people, over a third of the congregation -- an excellent turnout. He met with staff, board members, and representatives of key teams and constituent groups, including past presidents, stewardship, finance, capital fund, worship, facilities, membership, faith development and youth, music, café, and social justice. Barry led a stewardship workshop on Saturday afternoon attended by approximately 20 people, shared the sermon time with Rev. Amy during the Sunday morning worship service (outline provided as Appendix B), and summarized his findings and recommendations, and answered questions at a very well attended open forum following the service.



DATA AND ANALYSIS

Survey Results

Thirty-two people who attended the Friday and Saturday sessions completed a brief anonymous survey via Survey Monkey. Respondents identified important milestones in the life and history of the Congregation, listed the Congregation's strengths and challenges, and indicated a preference for growth. The survey form is shown in Appendix C and the results are below in the form of word clouds and narrative that reflect the most frequent responses to the three open-ended questions.

Milestones: the most frequently cited milestones by far were those surrounding the ministry of Rev Amy and the property transactions including people leaving as a result. Others included Rev. Ken's ministry and leaving, the founding of the congregation, moving to the current location, Rev. Naomi's ministry, and surviving the challenges and thriving.



What is Special at River of Grass UU?

During the open workshop on Saturday, March 2, each participant shared a story with a partner about a powerful moment they experienced at the Congregation -- a time when something memorable and moving happened for them personally. They then noted what is special here that enabled those moments to occur. The identified special characteristics, which should be talked about regularly, are:

- Loving
- Spiritual
- Supportive
- Young people can express themselves
- Warm, welcoming, friendly
- Inclusive
- Minister
- Committed volunteers
- Music
- Intentional
- Generous
- Depth of talent
- Staff
- Relevant music
- Per cent of the congregation that is active
- Amy's evolution
- Lay leadership
- Opportunities to lead
- Energy
- People helping
- Provocative messages
- Children love coming and dancing
- Safety
- Programs: Social Justice, small group ministry, cafe
- Sermons

Feelings About Money

Also during the Saturday afternoon workshop, a brainstorming exercise asked participants their immediate reactions to the word "money." The responses, shown in Figure 2, indicate a highly positive view of money; all of the responses were either positive or neutral, which is unusual. To the extent this attitude is pervasive in the congregation, it will be helpful as you engage with one another about the financial aspects of your planned future.

Positive	Negative	Neutral/Ambiguous
<ul style="list-style-type: none"> • Means of generating ideas (2) • Conduit to building the future we want • Sustainable • Opportunity • Growth (2) • Options • Planning • Energy • Stretching generosity (2) • One of many resources • Here for the asking • Currency of values 		<ul style="list-style-type: none"> • Don't spend what you can't get • Enough • Efficient use of • Win the lottery • Tool

Figure 2: Brainstorming Results about Money

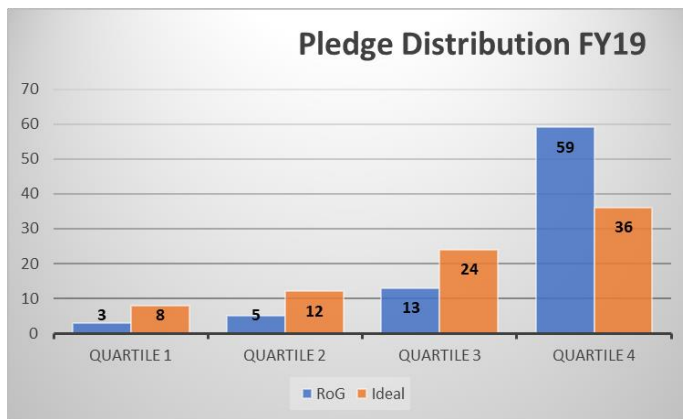
Dreams for a New Facility

During the Weekend sessions, congregation members discussed their hopes and dreams for a future facility that would more fully support your mission and vision, and allow for growth. While we did not

discuss dreams or requirements in any detail, we did get a sense of some important and recurring themes. One is simply need for more capacity. The sanctuary is near to full at times, and the RE spaces cannot accommodate the entire program: the OWL program is housed in additional rented space. Second is the need for dedicated space. While much creative and flexible use has been made of the current facility, people and programs are hampered by the lack of dedicated space for specific functions.

Third is need for outdoor space, which is not possible in the current location. This is important for children and families, and especially for attracting new young families who see existence of outdoor play space as a reflection of commitment to our young people. People noted that an outdoor space could also support a memorial garden, labyrinth, outdoor weddings and other ceremonies, and a range of multigenerational programming. Fourth, people spoke of being unable to transform the current space fully to reflect the congregation’s “green” values.

Analysis of Annual Financial Commitments



The graph to the left shows the distribution of River of Grass UU’s annual financial commitments for FY19 along with a comparison to an ideal distribution. As shown, the River of Grass UU distribution is significantly skewed. Three families that comprise the first quartile, represent 4% of the pledging households yet account for 25% of the total dollars pledged. The next five households or 6% account for the next 25%. Thus, half the total dollars are provided by eight households or 10%. We would ideally like to see 10% of the households in the first

quartile and 15% in the second, providing a more equitable funding stream and reducing risk and vulnerability to the congregation from dependence on a few large commitments. At the other end of the distribution, the fourth quartile includes 74% of the households, and 19 households or 24% contribute \$500 or less.

Table 2, on the following page, provides additional pledge data for FY19.

A review of year over year changes from FY18 to FY19 indicates little change: four fewer pledging households and slightly higher mean and median pledges in FY19, but a lower total. Thirteen households who pledged in FY18 did not do so in FY19; these are shown as the Zero pledges in Table 2. Countering those were 9 new pledges in FY19, with an average pledge of \$747 and a median of \$600.

The 80th percentile, shown in the second column from the right, can be a useful benchmark to offer congregants. This is the level which might be expected from a highly committed family with typical resources in the general geographic area. For River of Grass UU, the 80th percentile pledge is \$3,600, up from \$3,228 the prior year.

It should be possible to encourage more equitable giving through education, communication, inspiration, and a more energetic and focused annual stewardship campaign, based on direct personal stewardship conversations.

	RoG	Ideal	RoG	Ideal	High Pledge	Mean Pledge	Median Pledge	Low Pledge	80TH %ile	TOTAL
QUARTILE 1	3	8	4%	10%	\$19,200	\$15,848	\$15,444	\$12,900		\$47,544
QUARTILE 2	5	12	6%	15%	\$12,000	\$9,604	\$9,600	\$6,420		\$48,020
QUARTILE 3	13	24	16%	30%	\$5,550	\$3,983	\$3,600	\$2,400		\$49,380
QUARTILE 4	59	36	74%	45%	\$2,280	\$837	\$756	\$50		\$51,758
No. \$10K and up	5		6%							
No. \$5K to \$10K	7		9%							
No. \$2K to \$5K	11		14%							
No. \$500 and under	19		24%							
Zero	13		14%							
TOTALS FY19	80				\$19,200	\$2,459	\$1,000	\$50	\$3,600	\$196,702
PRIOR YEAR FY18	84				\$18,900	\$2,404	\$992	\$10	\$3,228	\$201,927
CHANGE FROM PRIOR YEAR	-4				\$300	\$55	\$8	\$40	\$372	-\$5,225

Table 2: River of Grass UU Pledge Data FY 2018-19

Financial Reserves and Annual Budget Challenges

River of Grass UU is blessed with substantial long-term and operating reserves, resulting largely from the sale of property. Current balances are \$750,000 in a capital fund overseen by a separate corporation owned by River of Grass members; and \$120,000 in operating reserves. Annual expenses have been larger than revenues for several years as the Congregation has chosen to draw down operating reserves to fund excellent staff and programming. So far, this has worked out, but the operating reserves are now being drawn down rapidly and this approach will not be sustainable in the mid to long run. As a result, the Board has set an ambitious goal for this pledge drive, seeking to increase pledges from last year's total of just under \$200,000 to \$315,000. One critical goal of relocating is to obtain more space to promote growth while also potentially lowering facility costs through capital investment rather than ever-increasing lease costs; current facility costs total over \$100,000 per year, one-third of the total operating budget.

FINDINGS AND RECOMMENDATIONS

Readiness for your Future

Figure 3, on the following page, is a "balance sheet" showing positives and challenges for River of Grass UU in terms of readiness for a future that includes a larger, more functional home and a likely capital campaign to help finance the needed investment.

The balance sheet indicates that you are ready to move forward as the positives outnumber and outweigh the challenges, and a new facility is critical to sustaining and growing your robust programs and faith community. Moreover, the effort to carry out a successful capital campaign will help overcome the challenges.

<p>Assets:</p> <ul style="list-style-type: none"> • Excellent minister and staff, committed to helping lead the journey • Lay leadership – strong, skilled, dedicated, including younger and new members • Strong loving community – resilient, capable of doing, welcoming, supportive • Significant financial assets • Covenant of right relations – learning how to talk with one another • Accomplishments to date in only 20 years – full service congregation with full-time minister, other program and admin staff, and a dedicated facility with 130 members • Generous congregation • Talents that can be used in support of a capital campaign and any large project – music, leadership • Social justice • Fair compensation • Three-year horizon, providing much needed time • All of the special characteristics note above • Broad support for growth and recognition that the Broward County area should be able to support a larger congregation • A compelling case for a more complete, functional, and larger home to help along the next steps of your journey 	<p>Challenges:</p> <ul style="list-style-type: none"> • Need a common vision of an ideal future state, a challenge when there is no tangible solution in front of everyone. • Lack of stewardship infrastructure – one-on-one visits, which will be required for a combined campaign, not done for a while • Need to demonstrate financial sustainability in the facility solution pursued; incorporate a long-range financial and resource plan
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Figure 3: Capital Campaign Readiness Balance Sheet

Recommendations

My recommendation is that River of Grass UU move forward along an intentional and aggressive plan toward a new home that meets your mission, vision, and dreams. Begin now by rapidly reaching agreement on the fundamental direction to take, and then proceed on two parallel tracks: one to define the project and a second to provide the finances, assuming the project requires additional investment.

In addition to the specific recommendations, continue the conversation begun this weekend, both in formal and informal settings. Encourage people to talk with one another, one on one and in groups, to share and refine their hopes and dreams, and to voice any concerns they may have. Communication and engagement in all forms are critical to success.

The specific recommendations below provide a path toward your new home. In terms of timing, focus the work toward being ready to conduct a combined annual/capital campaign in late 2019 and into 2020. This requires a financial feasibility study (Recommendation 5d) no later than October or early

November 2019. And recommendations 1-4 must be substantially complete before that. Note that much of the work can be done in parallel and should be done as rapidly as possible to sustain momentum. I find that getting initial versions done quickly and then refining over time helps congregations keep these projects from getting bogged down.

1. *Rapidly Reach Agreement on an Approach to Your New Home*

The first step is to reach agreement on the approach to be taken to addressing future facility needs. Establish and carry out a process that engages interested members in rapidly exploring potentially feasible options such as:

- remain in the current facility, perhaps expanded
- purchase a new facility with a capital campaign to finance the investment
- obtain a long-term lease in another location
- pursue a shared arrangement with another entity
- merge with the UU Congregation of Fort Lauderdale
- purchase land and build with a capital campaign

The process should consider costs, benefits, risks, impact on mission, and feasibility. The end result should be a clear congregational affirmation of a chosen approach, enabling effective pursuit of the rest of the recommendations, which should be tailored to the results of this process.

2. *Organize for the Work and Take Initial Steps*

Create an organizational structure to plan and conduct the necessary elements of a successful move to a new home, including a likely capital campaign. Keep the following teams small and lean, and engage lots of other people for one-time and short-term tasks: see this as an opportunity to involve new people in leadership roles. Appendix D is a generic organization structure that provides useful information about roles and responsibilities as a complement to the following.

- *Steering Committee*: three people, to oversee, coordinate, and drive the process, including communication planning and coordination. The Steering Committee will serve for the duration although members may rotate on and off.
- *Vision Task Force*: a small, creative team to develop a clear vision of what River of Grass might be in the mid to longer-range future (5+ years). Starting with your current strategic plan, consider the kinds of ministries and programming you will have, your engagement with the broader community and neighboring UU congregations, your likely demographic composition, and potential membership size for adults, youth, and children. Then determine what you would like in a new congregation home to support this vision. Determine the best way to articulate the vision and the kinds of facilities that would satisfy it, likely including drawings and text. Engage the congregation at key points in the process.
- *Facility Research Task Force*: a small team to explore potential real estate opportunities in the local area. Coordinate with the Vision Task Force to ensure that options under consideration will achieve the vision. Consider capacities for various functions and spaces, location requirements, need for flexibility of various spaces and dedicated specialized spaces, technology, aesthetics, etc. Consult real estate professionals, review recent transactions, visit other congregations to get ideas, consider a range of options from vacant land to commercial

office space to existing congregation buildings. Collect information about likely costs in various locations.

- **Finance and Campaign Task Force:** this team is responsible for providing the resources needed to finance the project, including planning and executing all elements of a combined campaign, as outlined in Recommendation 5. This team will begin immediately, focusing initially on developing a five-year financial/resource plan (see Recommendation 4). It will also begin to educate the congregation about capital campaigns and success factors, cultivating potential major donors.

3. Define Your Dream Facility for the Next Step

Consolidate the work of the vision and facility research task forces and create a high level concept of a facility that would support your vision and meet your needs for the next decade or more. Develop rough cost estimates, including purchase price, construction or renovation, furnishings and equipment. In developing cost estimates, coordinate with the Finance and Campaign Team to consider the likely range of total capital you might have to invest to be sure that your options are potentially feasible. The sum of your assets will include your current capital fund, preliminary estimates of proceeds of a capital campaign (3-5 times annual giving is a rough starting point, \$600,000 to \$1,000,000 for River of Grass), plus some potential borrowing. You might find it helpful to develop three alternative facility configurations to show people the range of possibilities that would align with the vision. Conduct an informal preference straw poll to choose one to be the basis for the Financial Feasibility Study.

- 4. Develop a Long-range Financial and Resource Plan** – Create a long-range financial plan, identifying all of the resources needed to support your vision over the next five years at least. The plan should present all assumptions about capital needs and annual budgets and required pledging to support goals and objectives. Of importance, the plan should provide a compelling picture of how you will create sustainable budgets over a period of time by investing in a capital purchase rather than continuing to lease space.

Appendix E is a template you can use to get started, tailoring it as needed. Include one-time and ongoing costs related to the move to a new facility, balanced with revenue from the capital campaign and the potential for some level of mortgage financing. Consider any potential changes in staffing needed to support anticipated growth and mission and program needs. Use this process to show all of the resources available for capital investment and operations including your current capital and operating reserves. Complete Initial version quickly and refine as the project progresses.

Present the financial plan to the congregation in various ways and discuss assumptions and implications for capital and annual pledging; this can be an excellent vehicle to encourage members to think about their financial commitments in a new light, and also to develop a better understanding of how finances work for the congregation. 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 congregation community.

5. Plan and carry out a successful combined campaign in Winter/Spring 2020

Build on the preceding steps to plan, organize, and carry out an excellent combined annual/capital campaign. Implement best practices as documented in the book Beyond

Fundraising, by Wayne Clark of the UUA. The goal of conducting the capital campaign next winter/spring is to enable you to raise as much money as possible over the two years that will then be remaining on your lease. This will give you maximum flexibility in terms of purchase and financing options.

To carry out the campaign, conduct the following activities:

- a. Continue to build enthusiasm and momentum, and...hoopla! Provide many opportunities to engage people about the plans, offer tours of your current facility so people will understand its limitations, answer questions, focus on inspiration, information, transparency. Also offer tours if possible of other available facilities for contrast. Don't take for granted that everyone knows about the constraints and challenges of the current facility, or what is possible elsewhere. Use social media, old-fashioned approaches, and all available mechanisms for communication and engagement.
- b. Develop a detailed plan and schedule, identifying major milestones, activities, volunteer needs, and events; get these on the Congregation calendar early. Involve new people in the planning and execution. Include a comprehensive communication plan on two coordinated tracks – project and money. For the project, clarify scope and capacities, costs, options considered, how this plan meets our needs and responds to the input received from members. For the money, educate people on the financial needs of the project and what it will take to raise the needed amount; share stories from other UU congregations that I will provide.
- c. Cultivate potential major donors with initial contacts beginning now – review the directory and identify potential major donors, including any who might make a lead gift of 10% or even 20% of the goal. Develop and carry out a strategy for each potential donor, noting who should visit with each one and what the key message should be. Note that initial visits are not direct asks; rather they are chances to talk, answer questions, gauge level of support and potential giving.
- d. Conduct a Financial Feasibility Study (FFS), ideally in the Fall of 2019 – as soon as the congregation has embraced the vision and been educated about capital campaigns. The purpose of the FFS is to validate the level of understanding of and support for the plan, test effectiveness of communication and messaging, and estimate how much money might be raised.
- e. Obtain formal Congregational approval for the combined annual/capital campaign.
- f. Conduct the quiet phase to line up major gifts, that is, \$10,000 and up, in late 2019. Begin with a leadership event to thank the potential donors for their past support, share some new information with them about the project (perhaps a near-final draft of the brochure or video presentation), explain the campaign goals and how important their support will be, and summarize the process and schedule. Follow this up with one-on-one conversations within a week or two. Analyze results to ensure that the leadership gifts are lining up with expectations, make any adjustments to messaging or goals.

- g. Conduct the general phase of the campaign, reaching everyone not included in the quiet phase. Continue the hoopla with an inspiring kick-off event and announcement of how much money has been raised so far, along with an appeal to reach our goal and attain 100% participation. Conduct one-on-one, in-person conversations, ideally using the same visiting steward assignments as for the annual drive. Track and report progress and conclude with a big celebration.

6. Other actions to shore up finances and stewardship

Pursue the following in support of the Combined Campaign and long term financial and stewardship health:

- Arrange for an outside, independent review of your books and controls, a good practice generally, that will contribute to member confidence and trust about control over capital funds. Try to swap review services with a neighboring congregation instead of paying for this service.
- Consider naming rights and other recognition policies and opportunities as a motivator for major givers.
- Make sure it is as easy and flexible to give to River of Grass UU as possible, in all of the ways people prefer today. Expand use of and promote electronic pledging and giving, credit cards, text to give, etc., for annual and capital campaigns as well as during Sunday services, the auction, café, and other events. Be sure you are set up to accept publicly traded securities and mutual funds through a brokerage account, that you can accept Qualified Charitable Distributions from peoples' Required Minimum Distributions, a key source of capital campaign funds, and that you can accept funds from family foundations, donor advised funds, and similar instruments.
- Stay current with technology for member engagement and use all available tools and social media to support the new home project, stewardship and the combined campaign.

PROPOSED STEWARDSHIP CONSULTING SUPPORT

Table 3 on the following page presents recommended consulting support that will enhance your likelihood of success. Continuing to work with your stewardship consultant will help you plan and carry out the specific recommendations and tasks presented above. As important, it will help you build and sustain enthusiasm, momentum, and energy throughout the leadership and the congregation.

Labor charges are based on an hourly rate of \$130, and are billed only for time spent; each contract will have a ceiling or not-to-exceed amount, and I will work with you to manage costs within the ceiling. We charge for up to six hours for one-way travel time for each visit. Keeping these costs in perspective, if River of Grass UU raises \$600,000 (3 times this year's annual pledge total) for a capital campaign, the maximum consulting costs will be approximately 2.5% of the total raised.

Support	Scope of Work	Est. Level of Effort & Cost
Early, Pre-Campaign Support	<ul style="list-style-type: none"> Assistance on an as-needed basis with Recommendations 2-4, especially development of the long-range financial plan 	8-20 hours depending on ROG needs, assume all to be done remotely, \$1,040 to \$2,600
Financial Feasibility Study	<ul style="list-style-type: none"> Detailed assessment of readiness for the capital campaign, estimate of how much money can be raised, and recommendations about messaging and other success factors 20-24 one-on-one, in-person interviews with a sample of pledging households, supplemented with some survey data Meet with leadership and campaign team while on-site and also conduct informal training for doing major donor asks 	52-56 hours, hours plus expenses for one visit, \$8,500 to \$9,500
Combined Campaign Support	<ul style="list-style-type: none"> Support for campaign planning following the FFS Regular phone/video conferences plus one on-site visit to train visiting stewards Review of materials Follow-up lessons learned to strengthen ongoing stewardship 	20-24 hours, \$3,000 to \$4,000, including expenses for one visit

Table 3: Recommended Consulting Support

CLOSING

I enjoyed my weekend at River of Grass UU very much, and spending a Sunday worship service with you was an absolute treat. As I said, you have come far and done very well on your 20-year journey, and I can't wait to see where you go next. I am certain it will be wonderful. The text box reprises the 6-word journey I offered you during the Sunday service.

Dream together, build a grand future

It has been a pleasure and an honor to be with you for the New Home Envisioning Weekend, and I welcome the chance to continue to work with you.

Faithfully submitted,



Barry P Finkelstein
 Stewardship for Us
barrypf@gmail.com

Delivered to:
 Scott May, President
 Rev Amy Carol Webb, Minister
 Rita Cherubini, Vice President
 Brit Lundell, Treasurer

Copy to:
 Connie Goodbread, UUA Southern Region



Appendix A: New Home Envisioning Weekend Schedule

March 1-3, 2019

Date	Time	New Home Envisioning Activity	Number of Attendees (+ Barry)	Child Care
Fri 3/1	4:45p - 5:30p	Small Group #3 – Past Presidents	3	-
Fri 3/1	5:30p - 6:00p	Meet with New Home Team & facility tour	3	-
Fri 3/1	6:00p - 6:30p	Small Group #1 – Minister	1	-
Fri 3/1	6:30p - 7:00p	Small Group #2 – Staff	4	-
Fri 3/1	7:00p - 8:30p	Informal reception with Barry & ROG Leaders	28	-

Sat 3/2	9:50a - 10:35a	Small Group #4 – Finance & Capital Fund	10	-
Sat 3/2	10:45a - 11:30a	Small Group #5 – RE & Facility	9	-
Sat 3/2	11:35a - 12:20p	Small Group #6 – Social Justice, Membership,...	6	-
Sat 3/2	12:30p - 1:15p	Small Group #7 – Music & Worship	7	-
Sat 3/2	1:15 - 2:00p	Working lunch with New Home Team	2	-
Sat 3/2	2:00p - 3:15p	Open Group #8 – Dedicated Leaders	20	Yes
Sat 3/2	3:30p - 4:00p	Brief recap with New Home Team	3	-

Sun 3/3	10:30a - 11:30a	Barry participated in Worship service	All	Yes
Sun 3/3	12:15p - 1:00p	Barry shared Insights & Recommendations	All	Yes
Sun 3/3	1:00p - 1:30p	Meet with Board & Minister for Next Steps	7	-

Appendix B: Outline of Worship Service Remarks

I am one of the crazy ones – someone who goes around the country talking to UUs about money in their congregations. Why I love UU stewardship – Our mission and vision – life saving and world changing – OWL, BLM/racial justice, LGBTQ rights, immigration. Our mission has never been more important than at this moment in time. We are called to be present and active for a time such as this.

What a journey you are on, a 20-year odyssey to build this wonderful, dynamic, energetic, loving congregation. You have come a long way in a short time and are ready to envision an even grander future. Which meshes nicely with our mission at Stewardship for Us – which is to help congregations achieve their grandest dreams.

I love that we are talking about journeys this month – we are too in Wilmington, using the Soul Matters program. For my small group session this month, I chose the exercise of defining my journey in 6 words. I enjoyed the exercise, did many 6-word versions of elements of my life's journey, and highly recommend the process to you. Well, I created a 6-word journey for River of Grass just this morning; here goes: ***Dream together, build a grand future.*** This captures pretty much all you need to know: let yourselves dream about what's possible, do the dreaming together, and go from there.

UU Stewardship and capital campaigns are deeply spiritual – the work we do to fund our programs and ministries, and sustain our facilities is a critical calling in our faith. Remember that we are a covenantal faith. This means we all make promises to one another and share the responsibility for our congregations and our broader movement. We also embrace congregational polity which means that we are in charge – we are the stewards in the journey that is this congregation. As the stewards in covenant with one another and with our UU movement, we – YOU -- are all there is in terms of sustaining and investing in this congregation and its facilities. A capital campaign is a link from the past to the here and now and into the future.

Capital campaigns are community-building. They bring out the best in us as individuals – generosity, imagination, commitment, courage, faith, trust in one another, investment in the future for generations to come. And they bring out the best in the congregation as a community – elevating leadership, strengthening structures you already have in place and fostering additional structures, encouraging effective communication and engagement – and active listening to one another; and strengthening the democratic process. To work, members have to delegate and trust – much of the work can't be done by a team of 130 – and at the same time have to be engaged and supportive when called upon. The campaign also provides opportunities for everyone to participate – not just the stewardship or money people – but literally everyone can and should play a role, and everyone's gifts, talents, -- and money -- will add up to success.

And of course, the feeling when it's all done and you're in your new home, stronger than ever in pursuit of your mission, the feeling of accomplishment is something else. Yet one more step on this grand journey that is RoG.

Can you do it? – yes! Just about every UU congregation has the capacity to do grand projects and fund them with successful CCs – IF you want to; and IF you have a project that you believe in and one that will further the mission of River of Grass. IF you come together, talk with one another, engage deeply with one another, and decide to make it happen.

And can you do it now? I would say Yes, that now is a good time to take these New Home Envisioning. You are pushing the limits of your current home and you can see things not here that you want and know will further your mission – and after all, that’s what it all comes down to. You have the energy, the drive, the deep desire to make this happen.

So... dream big, think expansively about what is possible. Enjoy the process – savor the chance to come together and talk with one another and imagine what this faith community might become over the next 5, 10 years and beyond -- for you, for future generations, the Broward County community, and the world. The possibilities and the promise are exciting.

Appendix C: Survey Form

1. What are up to three defining milestones or events in the history of River of Grass UU? Please use no more than 5 words for each.

1.

2.

3.

2. 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 River of Grass? Please use no more than 5 words for each.

1.

2.

3.

4. What are the three most important challenges our congregation needs to address in the next five years? Please use no more than 5 words for each.

1.

2.

3.

Appendix D: Generic Organization and Team Roles

Group or Team	Role	Notes and Comments
Board, Minister, Program Staff	<ul style="list-style-type: none"> • Be vocal and visible supporters and proud and generous contributors commensurate with means • Recruit key leaders • Help identify and solicit lead donors • Arrange congregational votes at approval milestones to ensure buy-in 	<ul style="list-style-type: none"> • Make the project and capital campaign a high priority for the board and congregation • Schedule formal and informal congregational votes throughout • Priority is broad engagement
Steering Committee	<ul style="list-style-type: none"> • Oversee and coordinate the entire effort • Ensure coherent messaging and communication plans across both teams • Provide a role for lead donors • Ensure active and enthusiastic engagement with the congregation, including events, technology, tours. 	<ul style="list-style-type: none"> • Involve people who are widely respected and trusted • Conduct rapid initial process to reach broad agreement on fundamental approach
Project Planning Team	<ul style="list-style-type: none"> • Flesh out and package plans and link to mission/vision/goals • Engage architect and other professionals • Devise and carry out communication strategy to engage the congregation • Develop packages at three different price points • Review the three options with the congregation and schedule a vote to select the preferred package • Develop case statement for the preferred option • Flesh out cost estimates • Finalize plans following the capital campaign 	<ul style="list-style-type: none"> • Seek to identify all cost elements and drivers from the outset and assist in developing the long range financial plan • Consider non-building items in creating project packages
Capital Campaign Finance Team	<ul style="list-style-type: none"> • Begin early planning for the combined campaign • Develop one or more essential gifts charts to show the range and number of contributions of various sizes needed to reach specific goals • Begin identifying and engaging potential lead donors • Work with the Project Planning Team in advance of the Financial Feasibility Study (FFS) to ensure a strong case for capital campaign giving • 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 • Arrange for the FFS, identify interviewees, assist with logistics • Conduct combined campaign assuming positive results of the FFS and congregational approval 	<ul style="list-style-type: none"> • Engage consultant to assist in campaign planning, FFS, and campaign execution • Assist in developing the long range financial plan • Engage the minister, program staff, and board to approach potential lead donors (consultant to assist) • Communicate stories from other congregations about sources of capital and annual campaign contributions (consultant to assist) • Collect and share your own inspiring stories about capital campaign giving • Emphasize annual giving and ensure a compelling case

Appendix E: Strategic Financial/Resource Plan Template

Cash Flow: Revenue	YEAR-2	YEAR-1	CURRENT	YEAR+1	YEAR+2	YEAR+3	YEAR+4	YEAR+5
Number of donor households								
Average annual financial commitment (pledge)								
Total annual financial commitments/receipts								
Total capital campaign commitments/receipts if applicable								
Other revenue (itemize major sources and amounts)								
Total Revenue								
Cash Flow: Expenses								
Staffing – number and details								
Payroll expense								
Debt service								
Contribution to reserves								
Generosity (social justice, denominational connection, etc.)								
Capital Expenses if applicable								
Other expenses (itemize facility costs and up to one or two other major cost elements)								
Total Expenses								
NET INCOME/LOSS								
Basic Contextual Data								
Number of members								
Average Sunday attendance (by service if multiple)								
Re enrollment								
Average RE attendance (by meeting time if multiple)								
# Classrooms needed								
Long-term fund balances (e.g., endowments, trusts)								
Other key parameters (e.g., parking spaces)								

Note: Rows can be tailored to include all items of relevance to your congregation.