

Dear UCM Members and Friends,

The UCM Governing Board is excited to share with you all the report we received from Mark Ewert, who was hired by the Board to help us evaluate where we are as a congregation around stewardship. You might remember seeing or meeting Mark at our services on January 13. As we contemplate significant changes to our building and facilities and seek to address our other long-term growth-related needs, the Board recognized that we needed someone with special knowledge and experience with UU congregations that have faced similar opportunities. It was especially important to bring someone in who could look at our whole situation in the field of congregational development, where we are with our finances, and how we can move forward, both in stewardship generally and for a future building project. The Board selected Mark Ewert, from Stewardship for Us (stewardshipforus.com) from several consultants due to his impressive credentials, experience, and knowledge of stewardship.

As you will see in Mark's report, as a congregation we have many strengths and assets. The Board would like to celebrate the passionate lay leaders, dynamic and effective minister, beautiful, well-maintained historic building, strong community service programs, and consistently high-quality worship, arts, and music that were so apparent to Mark during his visit.

As you will also see in Mark's report, stewardship is one area that, as a congregation, we could be doing better.

The report identifies the following recommendations, which the Board is committed to implementing: focusing on developing a culture of stewardship and generosity, bringing more of our friends in as full members of the congregation, making it easier through modern technology for people to give generously, and getting more lay leadership involved in stewardship.

We hope that you will read Mark's report and begin thinking about how you can help build the culture of stewardship that will allow UCM to continue to make such a meaningful difference in each of our lives and in our broader community. We, as a Board, found a simple definition of stewardship to help us all get started on the same page: "An ethic that embodies the responsible planning and management of something considered worth caring for and preserving."

With sincere thanks to all of you, and commitment from all of us,

The UCM Governing Board
February 2, 2019



Unitarian Church of Montpelier, Vermont
Next Steps Weekend Report
January 11-13, 2019

I. SUMMARY

The Unitarian Church of Montpelier, VT (UCM) engaged Mark Ewert, Unitarian Universalist stewardship consultant, for a Next Steps Weekend process. The objective was to assess congregational stewardship, toward building greater sustainability of its mission goals and a possible future capital campaign, and to recommend next steps. The Next Steps Weekend was conducted over the weekend of January 11-13, 2019 (the schedule is attached as *Appendix A*). Mark presented his initial findings and recommendations to the board and minister following the worship services on January 13th. This report presents the results of the Next Steps process.

The major findings are UCM has:

- Strong and capable lay leadership, which is particularly important during growth
- A dynamic and effective minister and good staff members
- Beautiful, historic, well-maintained, well-situated building and grounds. Lacking in handicapped accessibility
- Significant service to the surrounding communities, both onsite and in outreach
- High quality worship and music
- A clear and effective membership program; membership is growing
- Robust programs of Lifespan Spiritual Exploration
- Greater than usual challenge in recruiting lay leaders
- Larger than normal “friends” group, members who do not pledge, and people who have not changed pledge level in many years
- Improvements needed to annual giving drive and the long term stewardship program
- Too few large amount givers to the annual budget, and too many modest amount givers
- Too much fundraising activity in the congregation, and too few types of giving format options available
- Uneven preparation for a capital campaign. Some congregational functions need attention to be ready
- Recommended:
 - Build the annual pledge drive team
 - Grow stewardship culture
 - Make changes to the website to better present stewardship and increase options for giving
 - Improvements for the Long Term Stewardship program
 - Prepare function areas of the congregation for capital campaign readiness: stewardship, finance, data management, leadership recruitment
 - Consulting support for stewardship



II. INTRODUCTION

Background Data

Name and Mailing Address of Congregation	Unitarian Church of Montpelier 130 Main St, Montpelier, VT 05602
Website Address	Ucmvt.org
Dates of Visit	January 11-13, 2019
Minister(s)	Rev. Joan Javier-Duval
Point of Contact	Charlotte Root, Board Secretary
Number of Members	247
Annual Financial Commitments	\$283K 192 donor households
Average & Median Financial Commitment	Average = \$1,474. Median = \$800.
Approach to Annual Budget Drive	Annual congregational dinner
Date and Summary of Last Capital Campaign	2001: repairs to steeple, organ, kitchen, \$100K

Presenting Issues

Some presenting issues and needs:

- Moving toward capital campaign development
- Congregational giving levels not fulfilling budget needs

Advance Contacts

Mark received written materials from and had preparatory phone calls in advance of the visit with Charlotte Root, Board Secretary. Prior to the visit, Mark also had phone conversations with Rev. Javier-Duval; Sam Rossier, Administrator; and Joe Sullivan, UUA New England Regional Staff.

Historical Perspective and Context

Note: the history of the congregation is at its essence a history of stewardship. As such it is useful for understanding the inheritance its members are stewarding now, and how the current membership can live up to the boldness, generosity, and caring of previous generations.

The congregation was founded as the Church of the Messiah in 1864. That same year, the Rev. Charles Allen, a Unitarian minister, came as a "missionary" to Montpelier and found active interest in the creation of a new church. The congregation's current building, "the Meeting House", was designed by a Boston architect and Universalist minister - who also designed the nearby Vermont State House. It was dedicated in 1866, so work must have begun almost immediately. Although there had been an earlier



Universalist Society, and more people involved were Universalists, they chose to become a Unitarian Congregation. It was renamed the Unitarian Church of Montpelier in 1979, although there are Christian referenced plaques in the building from the earlier historical time.

The building sits adjacent to the Winooski River, which has flooded a number of times and damaged the building, most notably in 1927 and 1992. An addition was added on the West side of the church in 1984, not long after its first bell was installed (although the belfry was part of the original building). The sanctuary was renovated in 1999; there was a major steeple and organ restoration, and kitchen renovation in 2001. In 2014, more work was done on the steeple with a grant from the Montpelier Heritage Group. It now has UUA Green Sanctuary status. At the time of the consultant's visit, the basement had just been renovated with a new concrete floor and insulation.

In 2000, the Vermont legislature passed the civil union law and two LGBT members were joined in Civil Union at UCM. In 2013, UCM gained *Welcoming Congregation* status from the UUA, for their commitment to welcoming LBGTQ people.

After the Rev. Mara Dowall's departure in 2013, there was an interim ministry with the Rev. Steven Edington. The current minister, the Rev. Joan Javier-Duval, was called by the congregation in 2015. Note: There was a Next Steps process completed by another *Stewardship For Us* consultant, Barry Finkelstein, in 2014.

III. FINDINGS AND RECOMMENDATIONS

Commendations and Assets

- The congregation has a dedicated Board of Trustees, and other passionate lay leaders, who are engaged and growth oriented.
- Your called minister has energized the congregation, developed new ministries, and created more of a presence in Montpelier. The rest of the staff members also seem to be doing a great job.
- The building has been kept up well, so that there are no overbearing projects that need to be addressed. This is a feat with a building that is over 150 years old. It is also beautiful, in a good location right in the heart of town, and the sanctuary is a good size to accommodate growth (now that there are two services on Sunday).
- There are strong community service programs at UCM, including SPUDS (group volunteering in local nonprofits) and the Community Lunch program (provides nutrition to the needy and others).
- The welcoming and membership team, supported by the new Membership Coordinator have developed a good path to membership and welcoming program.
- Worship and music seem to be of consistent high quality and more is being done during the summer season.



- Lifespan Spiritual Exploration includes robust programming for kids, youth, and adults. The single committee model seems to be working well
- The congregation is growing, both in membership numbers and in age diversity. Lay leadership also seems to include people who have short tenures as well as long tenures in the congregation.
- UCM has been an Honor Congregation for many years, contributing financial resources and volunteers to the larger UU movement.

Challenges

- Gaining volunteers to serve in leadership, in key areas, is a struggle. This may be due to the congregation taking on too much, may be due to an older model of committee work, which emphasizes meetings and lots of discussion rather than alignment, decisions, and action. The lack of a leadership development program may also be contributing to this.
- Growth in membership and in programs has created stress on the various systems of the congregation, like recruitment of lay leaders. This is not unusual, as an increase in congregants precedes the support for expanded congregational capacity.
- Stewardship, both in the UCM member's giving levels and in the capacity and sustainability of that congregational function, could be improved. This topic is covered in more detail below.
- Although the building is beautiful and well cared for, accessibility for people with mobility challenges is poor, and some spaces are not adequate for the current or future needs. The kitchen being inadequate for the Community Lunch program is a good example.
- The congregation has a larger than normal number of "friends" (congregants that pledge or donate, yet are not members), about 150 people, and a good number of members who do not pledge. Although there are sometimes a good reasons for not joining a congregation (retired clergy from other denominations may jeopardize their pension), in many cases I have found the *friends* will often join is approached and asked well.

Opportunities

- Convert congregants to members and increase pledging among member households
- Plot out the many activities of the congregation as completely as possible, explore whether there are too many committees and projects for the available human and other resources, and if they are deployed effectively to achieve the congregation's priorities.



- Gain more information and instruct on volunteer management in the congregation, through a leadership development program.

Financial Stewardship

In a Unitarian Universalist context, very much like our faith, we work on a discernment model. We ask people to decide for themselves the correct amount to give to be in “right relationship” based on their own finances, connection to the congregation, and investment in its missions & purposes. This creates an openness that allows for an economically diverse community, yet also requires us to provide a good orientation and a suite of tools for their discernment process and practice.

Broadly, stewardship has not developed along with other parts of congregational functioning; this probably predates Rev. Joan becoming the settled minister. The lack of investment in that congregational system, and program, is manifest in the giving levels and stewardship culture of the congregation. The good news is that, in vibrant & engaged congregations like this one, this can be turned around quickly – as it has started to in the last few years. However it must continue to be developed and then sustained for the congregation to continue on its growth trajectory.

In general, the UCM website is not supporting stewardship well. Neither *Giving* nor *Stewardship* are in the top line navigation, are not listed in the pull down menus, and are difficult to find even using *Search*. The way the site is set up, everything is listed by posting date in the News section. This makes it hard to find things in particular categories (like Stewardship). There is also no way to give directly through the website. In fact, the congregation does not accept charge cards at all, which presents a number of problems for people wanting to give not in the forms of cash or check.

Long Term Stewardship

The term Long Term Stewardship is used to connect the elements of the congregation that are concerned with a longer time horizon (the operating budget is usually yearly). This might include the archives and history, a planned giving program, and endowment, etc. These *beyond the operating budget* resources are vital to reaching congregational goals, particularly in a time of growth.

UCM does not have a memorial garden, plaques in the building (for those that have left gifts or have named the congregation in their long term financial plans), a legacy society, educational events on legacy and financial planning, or personally asking for commitments.

It does have a fairly recent brochure, although that might be updated to be more complete. UCM does have record keeping of gift intentions, and has asked the Women’s Alliance as a group. Also, the Board fiduciary of the endowment is clear.

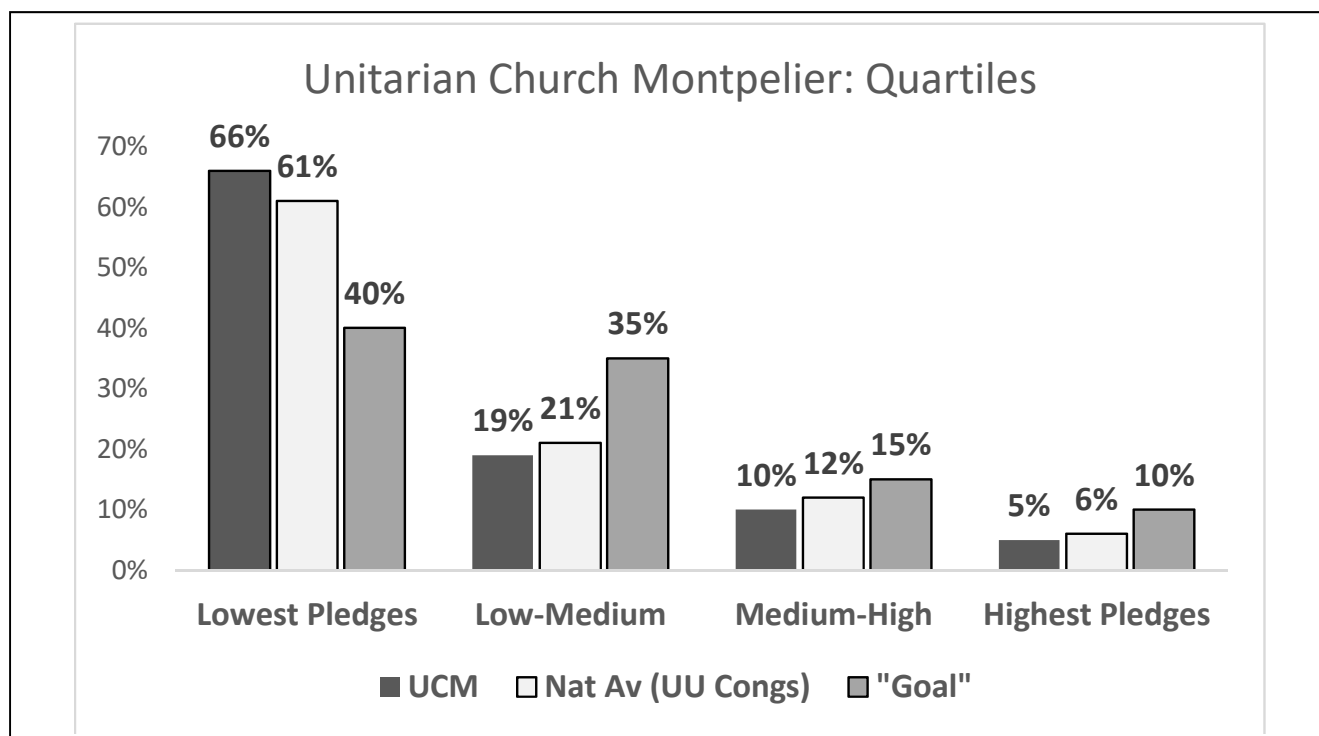
More broadly, there would be benefit to making the purpose of the endowment clear and compelling, as well as looking at whether the endowment might serve more purposes (if it were larger). The congregation lacks a Gift Acceptance Policy, which might support offering more ways the endowment might be used, among other things. The Planned Giving Policy is not as detailed as it might be, and the Gift Intent Form also needs some work.



Annual Financial Commitments (pledges)

Using the most recent annual pledge data, the average yearly pledge is \$1,474 and the median (mid-point) yearly pledge is \$800, not including 0 pledges. The national norms for median pledge amount is \$1,200 and the norm for the average is \$1,600, so the Unitarian Church of Montpelier's is well below on both of those. The disparity between the average and median pledge indicates that too much of the budget is being carried by higher amount pledgers. Also, please be mindful that these averages for UU congregations are probably less than desirable levels to begin with, given the demographics of UUs as a distinct group in the US population.

Although one expects, and may in fact desire, a broad range of financial commitments, the distribution of those pledges as expressed in quartiles shows an imbalance which creates an unstable financial base for the Unitarian Church of Montpelier. To understand pledging by quartile distribution, the total pledged amount (\$283,094) is divided into four approximately equal quarters (in this case, around \$70,774). Then from lowest to highest pledges, one sees what percentage of the total pledges are needed to fulfill each quarter. The effect of the quartiles is most easily seen in the chart below:



With only 5% of the pledges at the largest amount end of the range (fulfilling one quarter of the entire budget), if even one of those pledgers moves away, has a financial challenge, or otherwise reduces their pledge, the whole congregational budget is adversely affected. In the Medium-High category, there are only 9% of the pledging households. These are the most likely to move up into the top quartile; this potential high giver group is also less populated than would benefit the congregation.



At the low end of the range, 66% of the pledging households fulfills only one quarter of the budget. There may be people from this category in the congregation who have minimal resources or financial challenges, so that they are giving generously even with a small amount pledge. However, one must assume that at least some congregants in that lowest quartile might not fully understand or embrace their roles as stewards of the congregation, particularly given the demographics of the members and the context of the surrounding community. They might also need more information and a better invitation to join in the building of a financially diverse and vibrant community, where everyone must contribute generously from their resources, within their own economic circumstances – and understanding the congregation’s ambitious goals.

In summary, the quartile distribution shows an instability in congregational finances due to ranges that are out of balance. This is not the fault of the pledgers. It indicates that congregational programs and systems are not supporting (and/or have not supported in the past) education, engagement, and motivation in the area of financial stewardship. This report seeks to point to where those improvements might be made.

Strengths in the Annual Pledge Drive

The last few years have seen creativity and energy injected into the annual pledge drive. Credit for this seems to be due to the lay committee leader, Charlotte Root, and the direct involvement of Rev. Joan. The launch event dinner engages a good number of people and seems to have a strong program. The Suggested Guide is used and people are asked to self-identify by their chart level – this is recognized in the Annual Report. The congregation’s holiday card is sent by the stewardship committee, with lovely messaging. And this year, the Fall fundraiser was a nice program, aligned with *stewardship* (more on this below). If the committee can be sustained with new volunteer leaders, this is a good basis for growth in stewardship.

Challenges to Annual Giving

Membership and stewardship are closely related, as non-members will almost never understand themselves as a full stewards of the congregation. A good number of participants in the Next Steps process stated that they were attending for years before becoming a member, which means they probably did not get a good initial orientation to either membership or stewardship, despite the much clearer guidance in recent years. This is a vital element of developing the *identity* of steward at the Unitarian Church of Montpelier. This might also be contributing to some members not substantially changing their giving levels over time, when they have become more central in the congregation and gain more from it. One might assume there are a number of longer-time members who might still benefit from the basics on stewardship. And, as stated above, the congregation has an unusually high number of *friends*; who may never fully step into the role of *steward* in the congregation and who never got a good orientation to stewardship and membership.

Although the Stewardship Committee is an intelligent group with past experience in stewardship, there are some concerns related to the pledge drive:

- The lay leader of the annual pledge drive, Charlotte Root, has been creative and energetic in making the drive happen. She is leaving the post at the end of June, and her leadership will be



hard to replace. In addition, the rest of the committee seems as if it would benefit from some new volunteers.

- During the annual pledge drive, nothing has been happening related to that in the Lifespan Spiritual Development program.
- The congregation does not accept charge or debit cards. In fact no electronic giving is available to congregants.
- There is no *program based pie chart* presented, so congregants have simple representation of how the resources are used to fund the ministries of the congregation. This is important, as the line item budget is difficult to interpret, unless one has a deep background in the elements of a normal congregational budget.
- A *close the gap* request has been a regular feature of the pledge drive in recent years. This not only can reduce trust in the systems or the congregation, it can condition the members to withhold from their initial pledge, and extend the drive too long.
- A lay finance leader estimated to me that there are about 20 households that have given at almost the same giving level over a long period of time. This means those folks have not gotten the message that, as their own finances shift and as they become more engaged with the congregation, and as they become more inspired by the mission (and the needs of the congregation change) – so should their pledging level.

Fundraising vs Stewardship

There are quite a few fundraisers at UCM, for congregational purposes and for outside (nonprofit) donations. These include for the Women's Alliance, for Social Responsibility (Heffer International), the Rummage Sale, Holiday Fair, the regular auction (more on last year's auction below), Community Pouch, and the Community Lunch – which also gets outside funding.

These fundraisers may be lumped together in congregant's minds with the annual pledge drive. This might be creating some confusion where the members do not know that their clear priority in giving is for the annual budget during the yearly pledge drive. Unless given basic information and direction, members may be giving where it appeals to them rather than where it is really needed by the congregation. And some might think that giving to these other efforts is part of making a generous financial commitment to the annual financial needs of the congregation.

Fundraisers, where people receive a personal benefit (or material items) also encourage people to think of giving to UCM within an "exchange relationship" rather than in a covenantal relationship. In an exchange relationship, someone considers what she personally receives an item of value as a result of a "contribution", rather than contributing to the common good of the congregation and its purposes. For instance the cost of jewelry at the Holiday Fair might naturally be compared to what that piece might cost in a local store, whereas having a youth graduate from OWL and go to high school or college with rich knowledge about sexuality is, if not priceless, certainly worth more than the total cost of hosting the OWL program. This presents a challenge to the growth of the annual drive and people's understanding of stewardship. In a covenantal relationship, gifts that stretch a person's generosity (in the context of their own finances) or ones like a legacy gift can be transformative. They transform the giver, and they can transform the congregation.



Perhaps this can best be expressed with a simple chart:

Fundraising	Stewardship
Exchange Relationship	Covenantal Relationship
Impact/Preservation Based	Spiritual/Values Based
Romance/Negotiation Based	Discernment Based
Rummage/Auction	Pledge/Planned Gift
Transactional	Transformational

It is a good idea to give donors an opportunity to give at different times, in different formats, and for different purposes – so this must not be understood as a directive to do nothing but the pledge drive, ever. A good example of how a “fundraiser” can be much more stewardship oriented was the *Community of Love Celebration* last Fall. This was conducted in a different season than the pledge drive, was still funding the operating budget, and was a direct gift rather than a pledge. It was also oriented toward providing caring, fellowship, and service among the members – which is part of the core mission of the congregation. This might be contrasted with a normal auction fundraiser, which usually features items such as a gift certificate to a restaurant or the use of a vacation home, which have nothing to do with the congregation’s purposes.

Capital Campaign Preparation

The Unitarian Church of Montpelier has managed itself where it has not needed a truly ambitious capital campaign since 1984 with the new addition. Since then good work with renovation and preservation have been done with smaller scale campaigns, like the repairs to steeple and organ, and kitchen renovation in 2001. That was a preservation rather than a visionary effort, and was of a modest scale (under 2X the annual pledge amount at the time – which is not considered a true capital campaign scale).

UCM has been doing a good job of preparing for a capital campaign. It has articulated a new vision and is using a strategic plan, it has considered its growth needs, engaged the congregation, and made potential plans for significant changes to the building. There are also dedicated and energetic volunteers involved in that planning as a committee. This has mostly focused on the building and its future needs. In fact, particularly with the calling and good integration of Rev. Joan’s ministry, with exciting mission activities, and low conflict, the congregation is in a very good place to start planning a campaign. However, the stewardship and some other preparations have not been developing concurrently, at the same pace.

Some concerns are:

- Annual giving is not in as good a shape as one might desire in leading up to a major campaign. There has been good work in this area, yet new lay leadership needs to be recruited and brought up to speed to continue that development.



- The strategic plan names the need for building changes, yet aside from accessibility for people with mobility challenges, it does not make the case for requiring changes. The vision could be better and more explicitly linked to any building plans.
- Along with this, the Vision does not create a picture of what the congregation will look like once the vision is realized, with enough specificity, to inform a campaign. For instance what programs might be a central focus of the congregation in 2020 and what is required by the building to meet them? Although much of the vision is built around membership growth, pressure has been taken out of that challenge with going to two services, and there is often unexpressed ambivalence to growth in congregations.
- Your membership database, Breeze, is new. It is recommended that it be fully up to speed and people are comfortable using it before launching a campaign.
- Right now you are missing a key lay leader in your finance system, the Financial Officer. This is a capacity issue, particularly because a capital campaign creates significantly more demand on the finance systems of the congregation: doing financial projections, cash flow management, processing more and larger gifts, etc. In addition, your administrator is considering retirement; transition of a key staff member is to be avoided during a capital campaign.
- Currently, the Board and Executive Team are very busy, and new things to address keep popping up. They are operating at maximum capacity and possibly not in a sustainable way. Note: it is important for top leaders to be confident and non-anxious, and have some bandwidth for flexibility during a campaign.

A capital campaign will demand performance and reliability from all of these congregational systems, so you want to make sure they are set and have sufficient resiliency. This may require the leadership to slow down a bit, take stock, and continue preparation before going forward with planning the campaign itself.



Recommendations

With an engaged congregation, an inspiring and ambitious minister, great staff, and skilled leadership, the Unitarian Church of Montpelier is in a position to make significant changes, to grow its financial stewardship and prepare for a future capital campaign. This may be supported by the following initiatives:

1. Build Your Annual Pledge Drive Team

The Unitarian Church of Montpelier's annual pledging has not been growing to keep up with the needs of the annual budget. Of particular concern is the leadership and membership of that team. The most recent drive took some risks and was creative in a way that will make a big difference if that development can continue. However heart-centered and inspiring lay leaders, with skill in stewardship are not common in congregations. As well as addressing the concerns listed above, a rebuilding of that team is necessary.

2. Grow Stewardship Culture

Stewardship culture can be worked on year round as well as during the drive, and includes key alignments in the congregation, like membership and lifespan faith exploration. Who will do this at UCM? The Stewardship Committee capacity might be expanded to include this, as well as managing any fundraisers in the congregation and ensuring they are supporting stewardship as described above. On an operational level, this includes providing intelligence to retooling the website, arranging for new ways to give (charge cards, e-giving, etc.), converting friends to members, gaining pledges from more of the member households, and helping members who had been "stuck" at the same giving level for many years to understand the expectation that giving levels change over time.

3. Make Improvements to your Long Term Stewardship Program

Particularly in congregations with older and longer term members, a vibrant long term stewardship program is important. Ensure that the committee has the volunteers and resources it needs to keep going with a program of events, direct asking, and to create a legacy society with activities. Improve some of your key documents, and communication about the program. In addition, the finance team might look at the endowment and how its structure could be expanded to accommodate other financial needs in the congregation (which might also help it to grow). This might give a clearer picture of the purpose and impact of the Long Term Invested Funds, which provides inspiration and motivation to give.

4. Prepare for a Capital Campaign

UCM has done a good job in preparing for a building project, however other areas of congregational functioning are not as ready as they might be: finance, data management, top leader bandwidth, and particularly stewardship. The idea is not to wait for perfect readiness, which may never happen. The opportunity is to know the risks and challenges of a demanding project like a capital campaign, and prepare well enough to get going. This may be possible by Winter/Spring of 2020 for a combined campaign (annual + capital campaign), however it seems there is a lot to do for that to happen. This year's pledge drive will provide information that might help inform whether you shoot for 2020, or need to delay for more preparation.



IV. RECOMMENDATION FOR CONGREGATIONAL STEWARDSHIP SUPPORT

As discussed during the Next Steps Weekend, the consultant offers additional services to help implement the above recommendations. Please consider the following consulting services and timeline for their implementation:

Activity	Suggested Schedule	Recommended Consulting Hours	Consulting Fees @ \$130/Hour*
1. Support for the Annual Pledge Drive to help build a committee for the coming leadership transition, grow stewardship culture, improve pledge drive results, and support updates to the website.	Starting ASAP	32 Includes visit, volunteer training, phone conference, and e-mail support	\$4,160 + any travel costs
2. Long Term Stewardship support. To help create & refine the necessary materials, educate and launch a Planned Giving committee, prepare for asking, and guide in best practices using all elements of Long Term Stewardship.	Spring 2019	8 Includes education, phone conference, and e-mail support	\$1,040
3. Prepare for a Capital Campaign . Whenever the leadership assesses readiness, a consultant should be engaged early. Please contact for full information as the time for early planning begins.	As per leadership	A rough estimate of cost and on-site engagement will be created upon request	TBD

**Note – Consulting hours is a not-to-exceed amount stipulated in the Agreement document. In some cases, some of this time will not be used; only actual hours used will be billed. If travel is part of support, the time to travel one way from consultant’s office to work location shall be included in the consulting hours total (not time returning). Travel costs will be considered separately. This may include actual cost for air or rail travel, rental car and fuel, mileage for the use of personal vehicle (at the IRS business mileage rate then in effect), actual cost for lodging, meals and incidentals.*



Additional Resources

- The book [*Beyond Fundraising*](#), although dated, is still a valuable tool for all congregations.
- The [FORTH: Stewardship Development Program](#) is available on [uua.org](#). Recheck this to see if there are resources there that you are not currently using.
- [The Wi\\$dom Path](#) program and book [The Generosity Path](#) are great ways to help your members start thinking about money in deeper ways.
- The [UU Stewardship Lab](#) on Facebook is a great way to ask questions and gather ideas.
- The [UUA New England Region](#) is a source for all kinds of information and support, as are your surrounding New England congregations.
- Consider a [Faithify](#) campaign to engage members and non-members in a different way of giving.
- [UUA Listservs](#) are valuable resources for gathering intelligence from peers across the country. There is a nation-wide listserv for almost any interest area or need.
- To engage the children and youth in stewardship, consider integrating [Stewardship: The Joy of Giving](#) into your RE curricula.
- The [Stewardship For Us](#) blog is a rich resource that discusses stewardship in UU congregations. We also present regular webinars.

IV. CLOSING

The Unitarian Church of Montpelier is a vibrant, growing congregation that is engaged in preparing for its future. Although a number of recommendations are provided, they are with the intent of helping you move toward your greatest congregational ambitions. It has been a pleasure and an honor to consult with you. I look forward to the opportunity to provide additional consultation and help to guide you toward growing stewardship and realizing your longer range dreams.

I will contact Charlotte Root within a few weeks to see if there are any questions about the report and to discuss needs for further support.

Faithfully submitted,

Mark Ewert
UU Stewardship Consultant
(202) 722-8888
mewert@generositypath.com

Copy to:
Joe Sullivan, Unitarian Universalist Association New England Regional Staff



Appendix A

**Next Steps Weekend
 Consultant: Mark Ewert**

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Unitarian Church of Montpelier, VT

Friday Jan. 11th	
6:00 - 8:00 PM	Meeting with Board, Minister, and Executive Team
Saturday Jan. 12th	
Saturday	
8:00 AM	Consultant tours with Property Committee, Sexton, Accessibility Committee, Safety Committee
9:00 AM	Social Responsibility Committee, Community Lunch, Welcoming Congregation, SPUDS
10:00 AM	Finance Committee, Administration Committee (Personnel Committee) (Steering Committee)
11:00 AM	Stewardship Committee, Planned Giving Chair
Noon	Lunch with various folks: youth, newer members, non-leaders, elders, etc.
1:00 PM	Membership coordinator and Committee, Welcoming Committee, (History Committee)
2:00 PM	Worship Team, Worship Associates, Music Committee, Committee on Ministry
3:00 PM	Break
3:15 PM	RE Committee and DRE, Adult Spiritual Development, Small Group Ministries
4:15 PM	Caring Committee, Pastoral Associates, Jollification Committee, Women's Alliance
Sunday Jan. 13th	
9:00 AM	Attend First Worship Service
11:00	Attend Second Worship Service
12:30 - 2:30 PM	Debrief Meeting with Board of Trustees, Executive Team, Senior Minister