



The Unitarian Church of Westport – 2018-2019 Planning task and timeline leading up to a proposed campaign

TIMELINE	Event/Activity	Content	Who	S4Us engagement	Cost estimate
2018					
June 10	Annual Meeting	Brief presentation of plan to engage entire congregation from the early fall through the winter in a 2-phased rapid strategic planning and campaign readiness process, potentially leading up to a 2019 combined 'Fix it and Dream Ahead campaign' and annual pledge drive	Rev. John, Board	No	
August – September At least one in-person mtg. & 2 zoom calls	Planning and prepping for Searching for the Future/Strategic Planning Weekend (2-3 year maximum future outlook)	S4Us and TUCW designated liaison(s) set out agenda, identify facilitators, publicize the weekend to entire congregation, set up logistics for SFTF/Strategic Plan weekend	Rev. John, designated liaisons, S4Us	Y	Part of SFTF/Strat. Plg weekend cost – see below
Sept. 14-16 or Sept. 21-23	Searching for the Future Weekend	3 segments: Modeling workshop on Friday evening; Congregational workshops on Saturday; Wrap-up to create single mission statement and set up skeleton of Strategic Plan	Rev. John, designated liaisons, facilitators, congregation, S4Us	Y	Cumulative costs in range of 28 – 38-hours \$130/hr (\$3,640-\$4,940) (NB: No travel time or meals charged to TUCW, lodging may also be cost-free)



Stewardship for Us Team
Building Cultures of Generosity and Commitment

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By October 10	Strategic Plan draft completed	Shared crafting and copy-editing	TUCW designated writers, liaisons, and S4Us	Y	Included in above hours
Oct 14 - Thanksgiving	Completed strategic plan presented to congregation for discussion and vote	Allow for a series of coffee hours with the board or other interactive, listening and dialogue sessions as fits TUCW culture	Board, Rev. John	N	
By Thanksgiving	Preliminary identification of campaign leadership	Board, Rev. John and knowledgeable others identify and cultivate most likely co-Chairs and other Campaign team members, according to specific job descriptions and qualifications	Board, Rev. John, others as appropriate, S4Us	Y	Included in Financial Feasibility Study (FFS) cost below
Between Thanksgiving and Dec.14 – at least one mtg and homework	Start campaign readiness process	Strategic plan, building needs summary, and other key materials are combined to form basis of campaign case statement – Narrative and PPT versions created	TUCW designated writers, liaisons, and S4Us	Y	Included in FFS cost below
By December 21	Identify TUCW congregants to be interviewed in Financial Feasibility Study	Approximately 20 – 25% of TUCW pledge units to be interviewed, based on specific criteria that ensures representation of a cross-section of church membership.	Campaign leadership, Rev. John, Board, S4Us	Y	Included in FFS cost below
2019					
By January 3	Administrative support made available to Campaign leadership for FFS	The Campaign leadership will need part-time support from someone familiar with TUCW’s databases for FFS invites, tracking and follow-up	Rev. John, Campaign leadership	N	



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By January 7	Email invitations for interviews sent to selected list	Emails with Board signature are sent to all those invited to participate in FFS, with narrative case statement attached	Board, administrative support	N	
1/11-1/18	Follow-up to invitees	Get RSVPs from interviewees	Administrative support, Campaign leadership	N	
1/19 –2/2	FFS Interview period	Up to 8 confidential one-on-one interviews/day to take place primarily at TUCW; or in cases of disability at peoples’ homes. Phone call interviews discouraged.	S4Us, check-in on interview list management with Campaign Leadership	Y	
By 2/18	Financial Feasibility Study Report submitted to TUCW	The FFS is critical to determine congregational understanding, support, and likely financial commitment for a proposed campaign. Interview data is used with a campaign methodology to estimate likely congregation wide giving. Other important data is also summarized from interviews.	S4Us		Cumulative costs are significantly based on no. of interviews. Assuming range of 45 – 65 interviews, est. cost would be in range of \$8,500 – \$11,000 including travel. No travel time or meals charged to TUCW. Lodging can be negotiated to be low, or cost free.
By 2/28	Board review of FFS and decision about moving ahead with full vote.	Congregational vote is further opportunity for full education and encouraging support for combined “fix-it and dream” plus annual campaign.	Board, Rev. John, Campaign leadership	N	



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2/24-3/16	Preliminary identification of visiting stewards and other combined campaign team members	Line up the front-line team who will be asking for combined campaign gifts. Usual ration is no more than 4 asks per steward, but 6 are possible in a stretch.	Campaign leadership, existing Stewardship team, other key leaders.	if requested	
Sometime between 3/16 and 3/24	Visiting steward and campaign leadership training	Basic training in asking for a major gift, a combined annual and campaign gift, ability to answer FAQs, meeting face to face, etc.	S4Us, TUCW experts	Y	Campaign training and coaching as needed based on \$130/hr, range could be 28-40 hours @\$130/hr
April 1	Campaign Administrative support on board	Helping to make appointments, keeping track of donor visits, gift and acknowledgment tracking.	Campaign leadership, Rev. John.	N	
			Total cost estimates	Minimum (inc. travel by car)	Maximum (inc travel by car)
			SFTF/Strat Plan	\$3,900	\$5,190
			FFS	\$8,850	\$11,350
			Campaign support	\$3,900	\$5,450