

Miami Valley Unitarian Universalist Fellowship

Next Steps Weekend
March 7 to 9, 2025

Rachel Maxwell, Consultant



Chalice Lighting

Invocation - by Angela Herrera

Don't leave your broken heart at the door;
bring it to the altar of life.
Don't leave your anger behind;
it has high standards and the world needs vision.
Bring them with you,
and your joy and your passion.
Bring your loving,
and your courage and your conviction.
Bring your need for healing,
and your power to heal.
There is work to do
and you have all that you need to do it
right here in this room.





Rachel Maxwell, MBA

- Consultant with **Stewardship for Us**
 - Six team members
 - UU Congregations only
 - UUA endorsed
- MBA in sustainable systems,
- Lives in Edmonds WA on the beautiful land of the Coast Salish Peoples
- Unitarian Universalist for 30 years
- Member of Edmonds UU Congregation in WA
- Founder of community funding platform
- Leads events on Money Value & Meaning
- Passionate about building sustainable, generous, UU congregations and making their missions manifest in the world-- A world which could not possibly need them more!



What is the Next Steps process?

- **Gather information about your congregation**
 - Review your history, finances and structure before the weekend
 - Many meetings with staff, lay leaders, and congregants
- **Vision Workshop for all**
- **Provide reflections and recommendations:**
 - Presentation to congregation:
 - Current state
 - Workshop Report
 - Next steps and recommendations
 - Written report within two weeks



Moment of Delight

Moment of Delight!



MVUUF by the numbers

125 Members

66 Pledges

Average pledge
\$2,663

Median Pledge
\$1,800

Pledge Total
\$175,751

Budgeted
Expenses
\$364,339

From Building Sale
\$970,000
(as of 8-2024)

Endowment Fund
\$204,000
(as of 8-2024)

Cash Reserves
> \$100,000
(as of 8-2024)

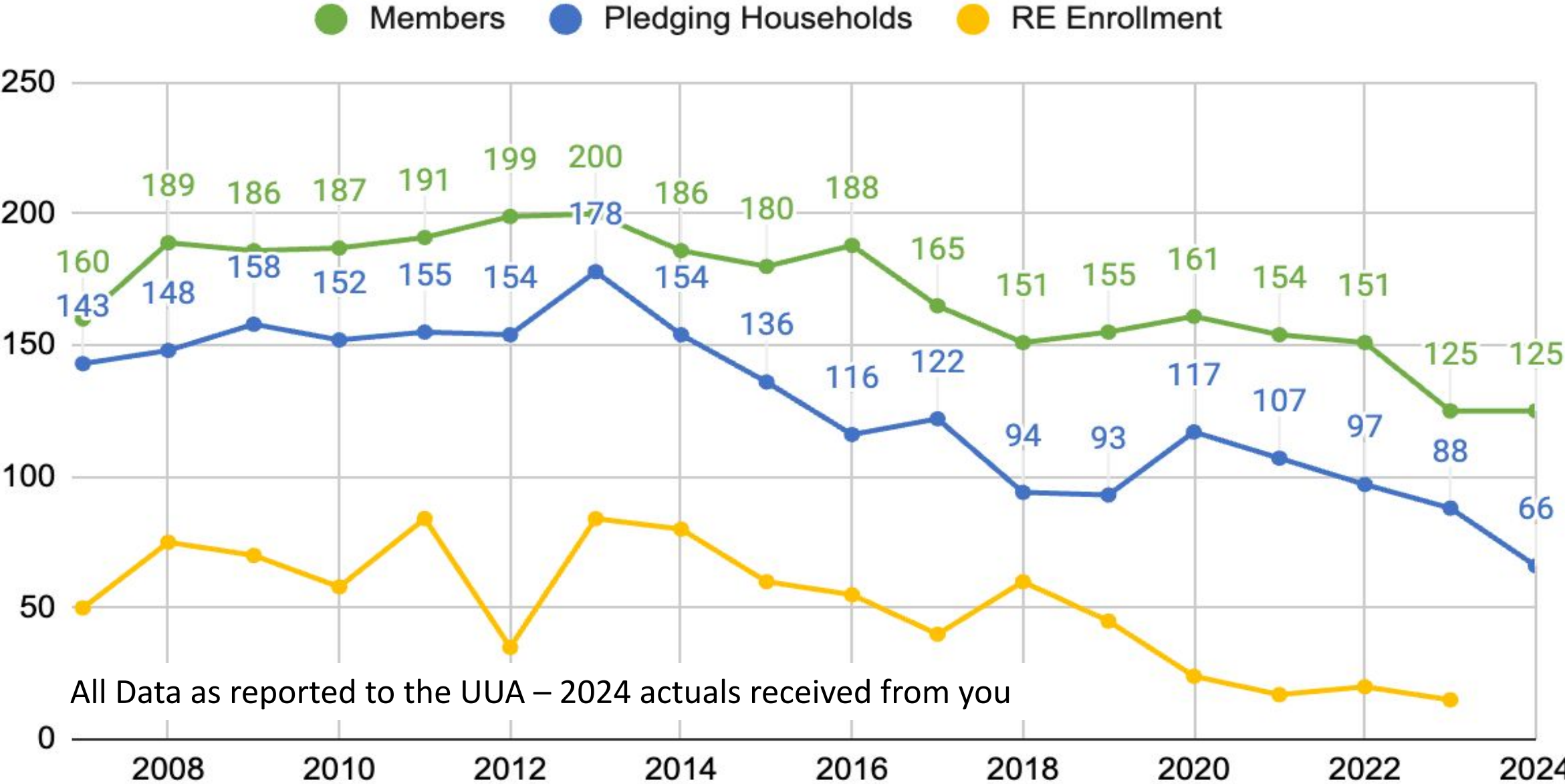
Pledge Distribution

(For FY 2024/25 pledging)

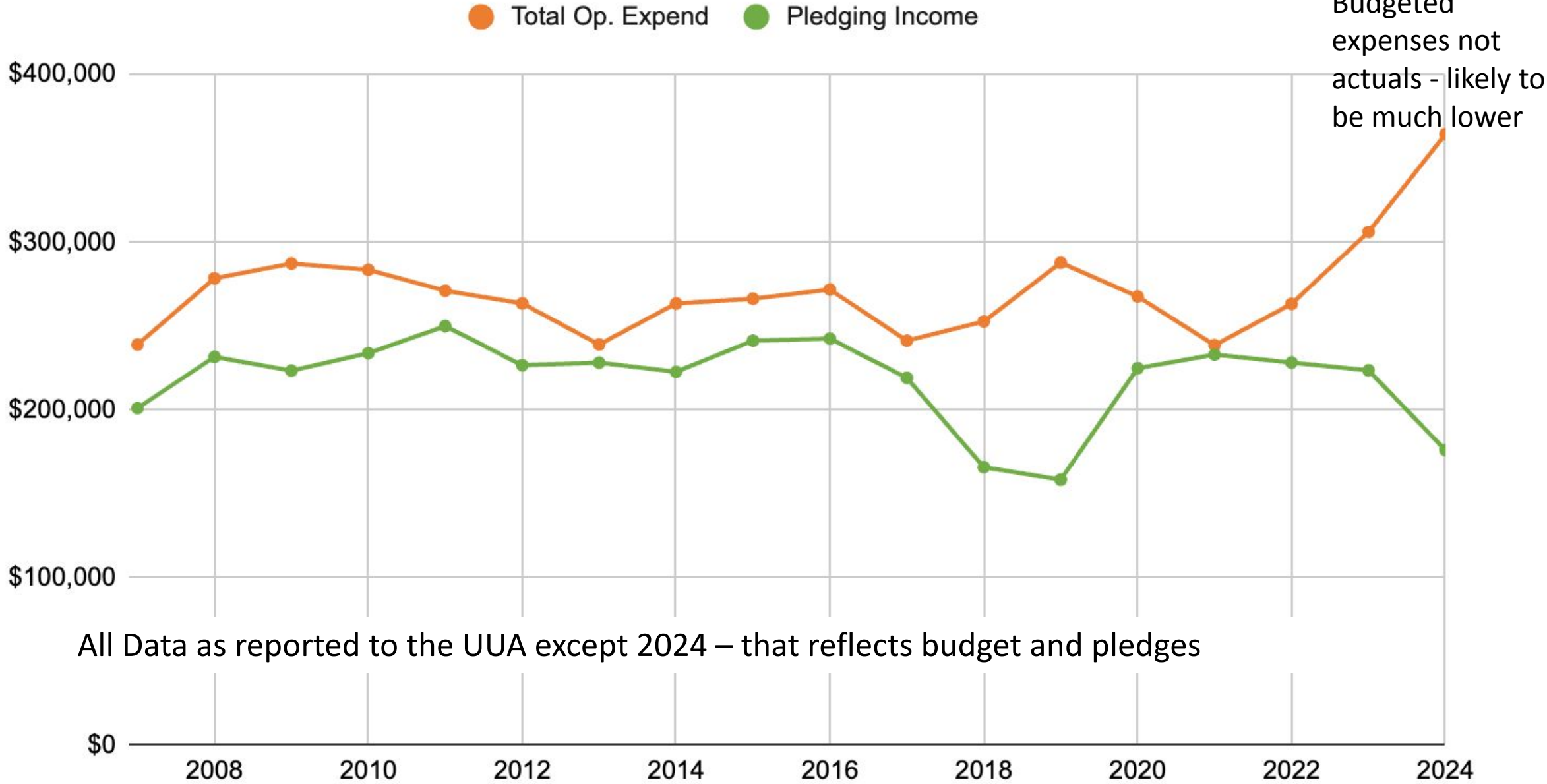
- Total # of Pledges = 66
- Pledge in 80th % = \$4,200
(“This pledge is “often a good reflection of the giving habits of families with typical resources and high commitment”
– Dan Hotchkiss)
- Average pledge = \$2,663
- Median pledge = \$1,800

Each 25% = ~ \$44,000	# of Households	Annual Pledge Range	% of Households
First 25%	5	\$7,200 to \$12,600	7%
Second 25%	7	\$4,800 to \$7,000	11%
Third 25%	13	\$2,500 to \$4,200	20%
Fourth 25%	41	up to \$2,400	62%

Members, Pledging Households and RE Enrollment



Total Op. Expend and Pledging Income



UU Shared Values
Statement includes
Generosity:

“We cultivate a spirit of gratitude and hope. We covenant to freely and compassionately share our faith, presence, and resources. **Our generosity connects us to one another in relationships of interdependence and mutuality.**”



Generosity



UU Shared Values
Statement includes
being generous in the
value of
Equity:

“We declare that every
person has the right to
flourish with inherent dignity
and worthiness.

We covenant to use our
time, wisdom, attention, and
money to build and sustain
fully accessible and inclusive
communities.”

Interdependence

Equity

LOVE

Three pillars of Generosity Culture

as articulated by Rev. Tandi Rogers
and Rev. Jan Christian

- We have moved beyond shame and blame and have learned to talk about money in ways that are life affirming and nurture generosity.
- We know that conflict is part of building and sustaining Beloved Community and we have ways to engage it and to let it deepen us and to move forward together.
- We have a shared sense of purpose and mission that nurtures generosity and imbues all that we do.





Vision Workshop

Vision = What you want the world to look like

Mission = What you do to drive the world toward your vision

GOOD EXAMPLE:

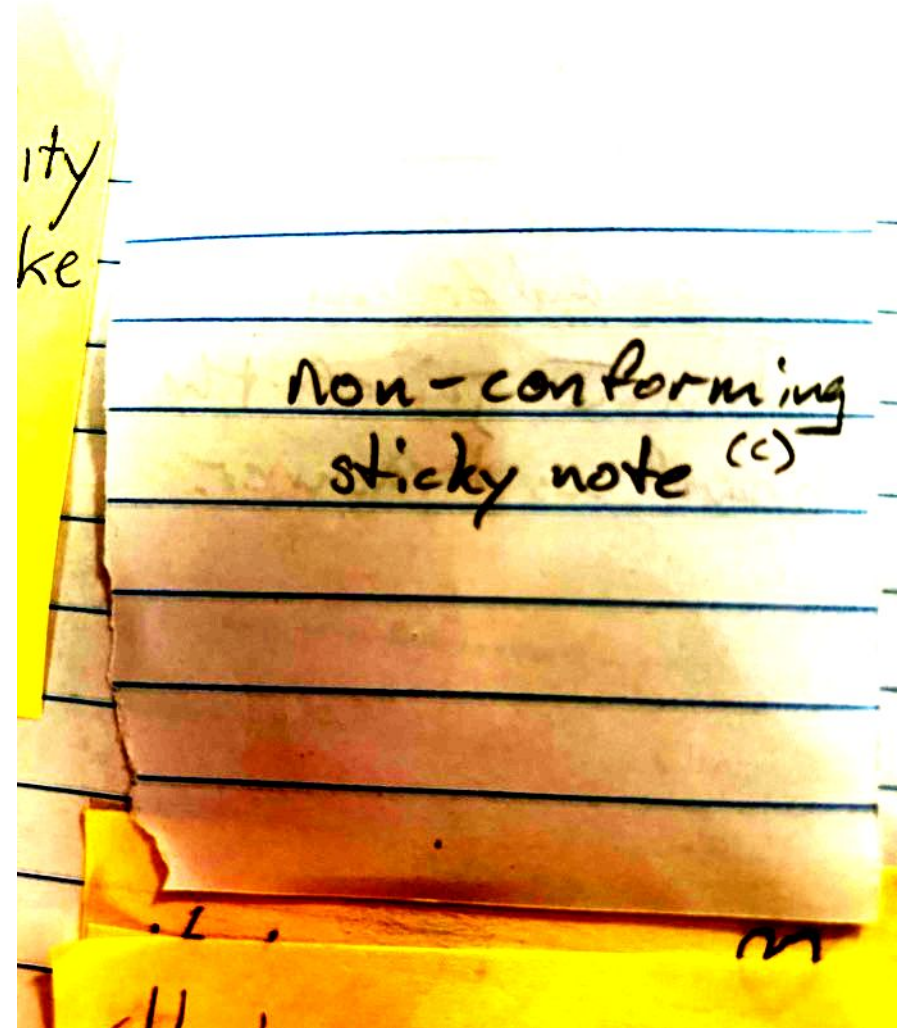
Vancouver BC Public Library:

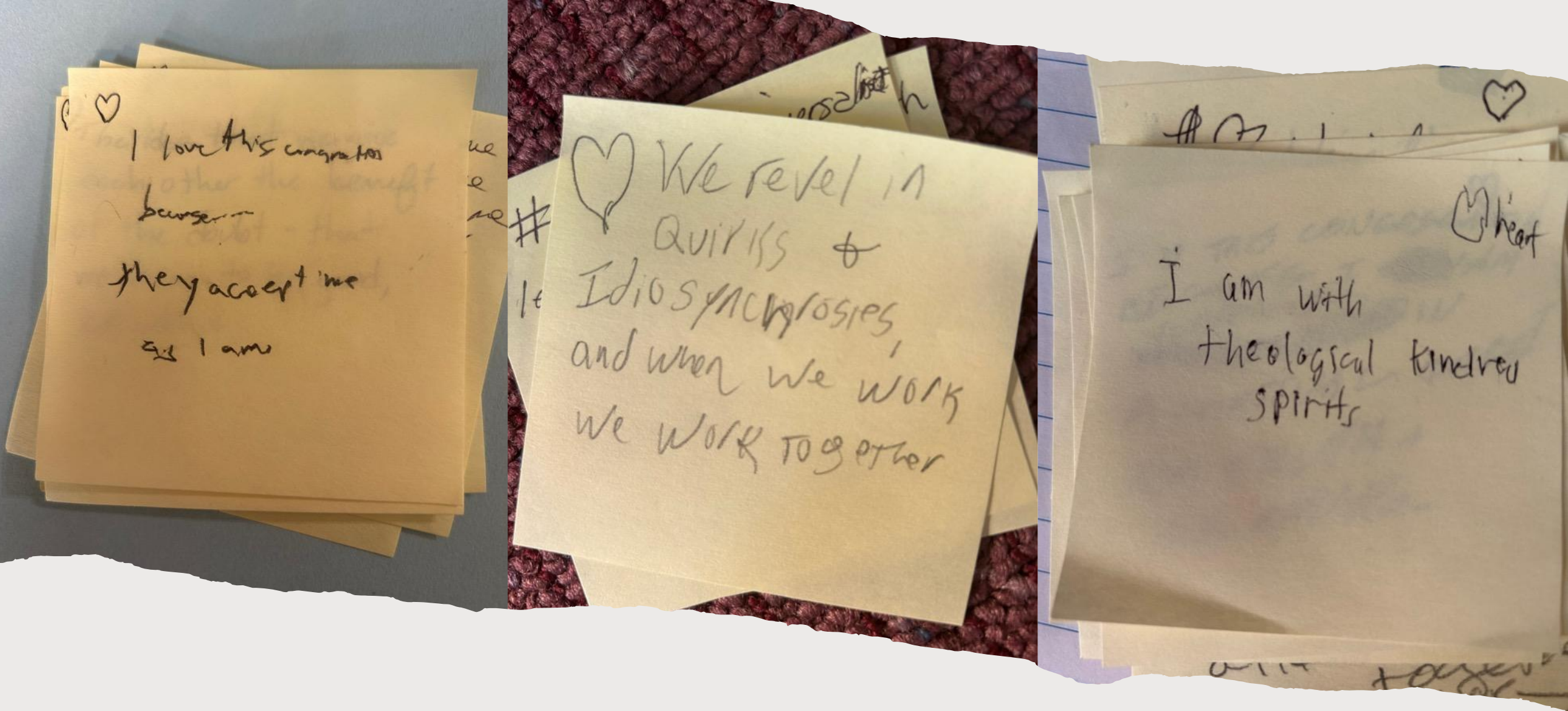
Our vision is an informed, engaged, and connected city.

Our mission is a free place for everyone to discover, create and share ideas and information.



Sticky Notes: Warm up to drafting Mission & Vision Statements





I love this congregation because...

★ I felt most alive,
engage, and committed
here when I felt like
I was experiencing faith
in practice - searching for
meaning, wrestling w/
covenant, justice work,
and even bureaucratic
governance.

★ I felt most alive when ...
one we participate in the
en pride parade and staff
re a booth. Also when part of
- the metropark tree planting
vo in the Ash tree epidemic
it

From Zoom

★
I felt most alive,
engaged & committed
here when ...
we were going thru
the move, ending
with the processional
service



I feel most alive committed and fully engaged
when....

A large orange circle on the left side of the slide, partially cut off by the edge. It contains the text "# Imagine if MVUUF was Making Headlines in 2035!".

#

Imagine if
MVUUF was
Making
Headlines in
2035!

Local Congregation Hosts Peaceful Mass
Demonstration: City Moves to Become
“*Sanctuary of Diversity* ” in Response.

UU Church Sponsors New LGBTQIA+
Homeless Shelter

MVUUF Installs Heat Pumps for Local
families: Replaces Old Gas Heaters

Local UU Youth Made their Unhoused Peers
Feel Welcome

MVUUF Partners with City to Offer OWL Sex
Ed Program to All Middle Schoolers

Congregation Partners with Local
Non-Profits to Change Zoning Laws

A series of four yellow curved dashes in the bottom right corner of the slide.

Draft Vision and Mission Statements

Vision statement from Zoom:

The vision of MVWF is to make this a more just, compassionate, and better world.

Mission Statement from Zoom:

To build a growing spiritual community that changes lives through intentional acts of compassion, service, love and justice.

VISION

In a world of hatred, iniquity & fear
we strive for inclusion, justice & hope as
a beloved spiritual community.

OR

A spiritual community creating a world
of justice, inclusion & peace.

MISSION

Identify our shortcomings and pursue a
just world within and without

OR

We dream of peace, justice & equity in
the world. We will accomplish this by
identifying our shortcomings, cultivating
nurturing relationships & building a stronger
community for ourselves and the Greater
Dayton Community.

Draft Vision and Mission Statements

Vision:

A world, local, state, country & world transformed & blessed through the embodying of values.

→ to be an inclusive community, free of need, inequality, injustice, & dehumanizing conditions in our community.

→ to be a powerful, spiritual community, free of need, inequality, injustice & dehumanizing conditions in our community.

Mission

To achieve our vision we will be inclusive

engage in transformative work, education & fellowship that strengthens our commitment to a engagement in realizing our vision for the world.

VISION

#4

AN INCLUSIVE AND JUST MIAMI VALLEY COMMUNITY WHERE ALL WILL THRIVE.

MISSION

AN OPEN & WELCOMING SPIRITUAL COMMUNITY THAT CHANGES LIVES THROUGH ACTS OF LOVE, SERVICE AND JUSTICE

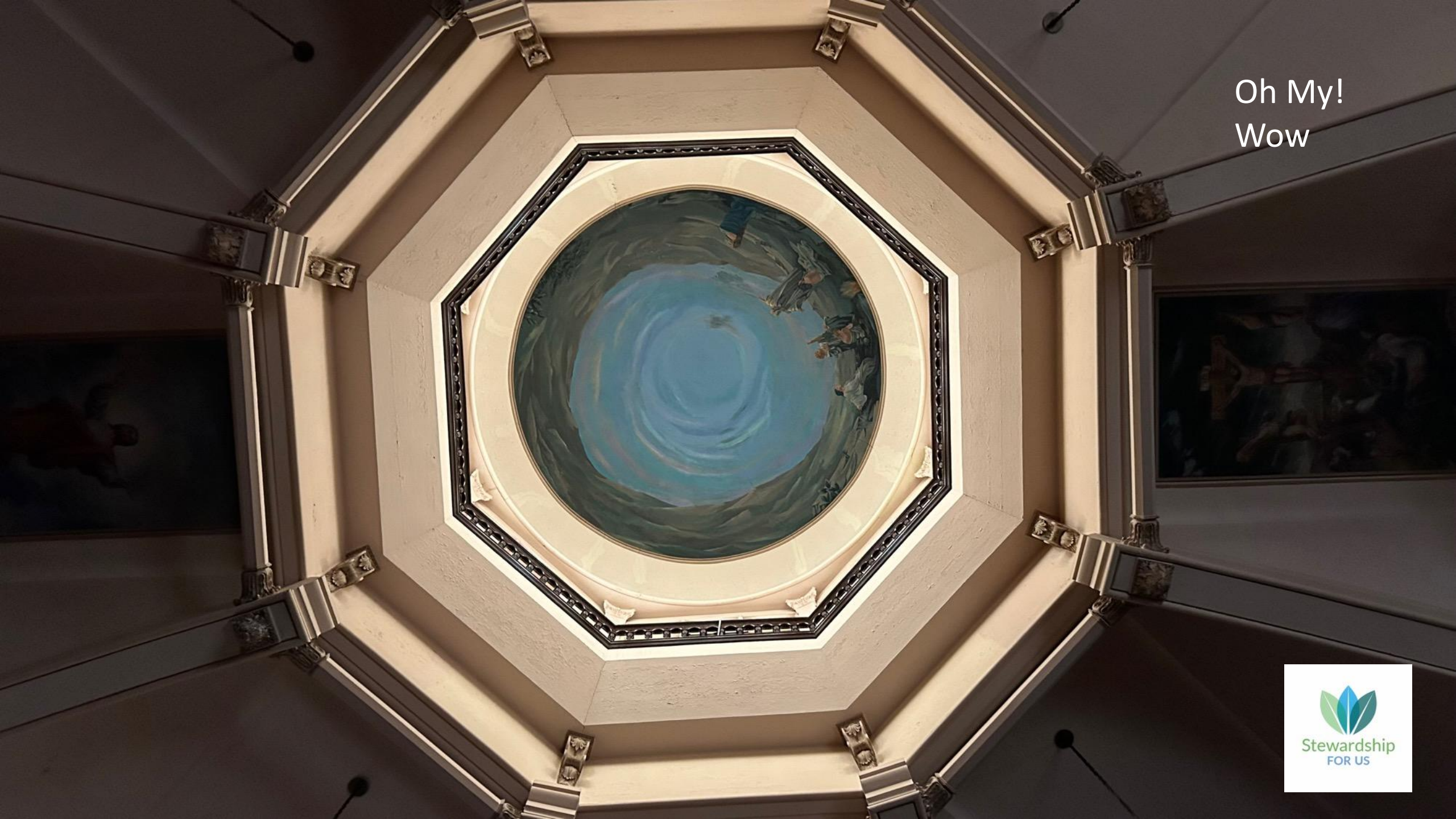
*Let us put our minds
together and see what
life we can make for
our children.*

– Sitting Bull

Mission Statement

- ① Love unapologetically.
- ② Listen humbly.
- ③ Question boldly.
- ④ Pursue justice.
- ⑤ Forge community.
- ⑥ Grow spiritually.
- ⑦ Act courageously.

Oh My!
Wow





Blessings

- You love MVUUF
- Resilience and adaptability
- Strong leadership
- Committed families
- Large central location
- No more facilities maintenance!
- Wonderful minister and staff
- Flexible landlord with many shared values

Challenges

- You just moved!!! It's taken lots of hard work
- Your congregation is smaller
- You've had deficit budgets
- The world is kind of a nightmare
- You're tired
- You've had some rough times and big losses in your past decade



My Assessment

You are small but mighty.

You will grow in spirit and as you do, your numbers will grow too.

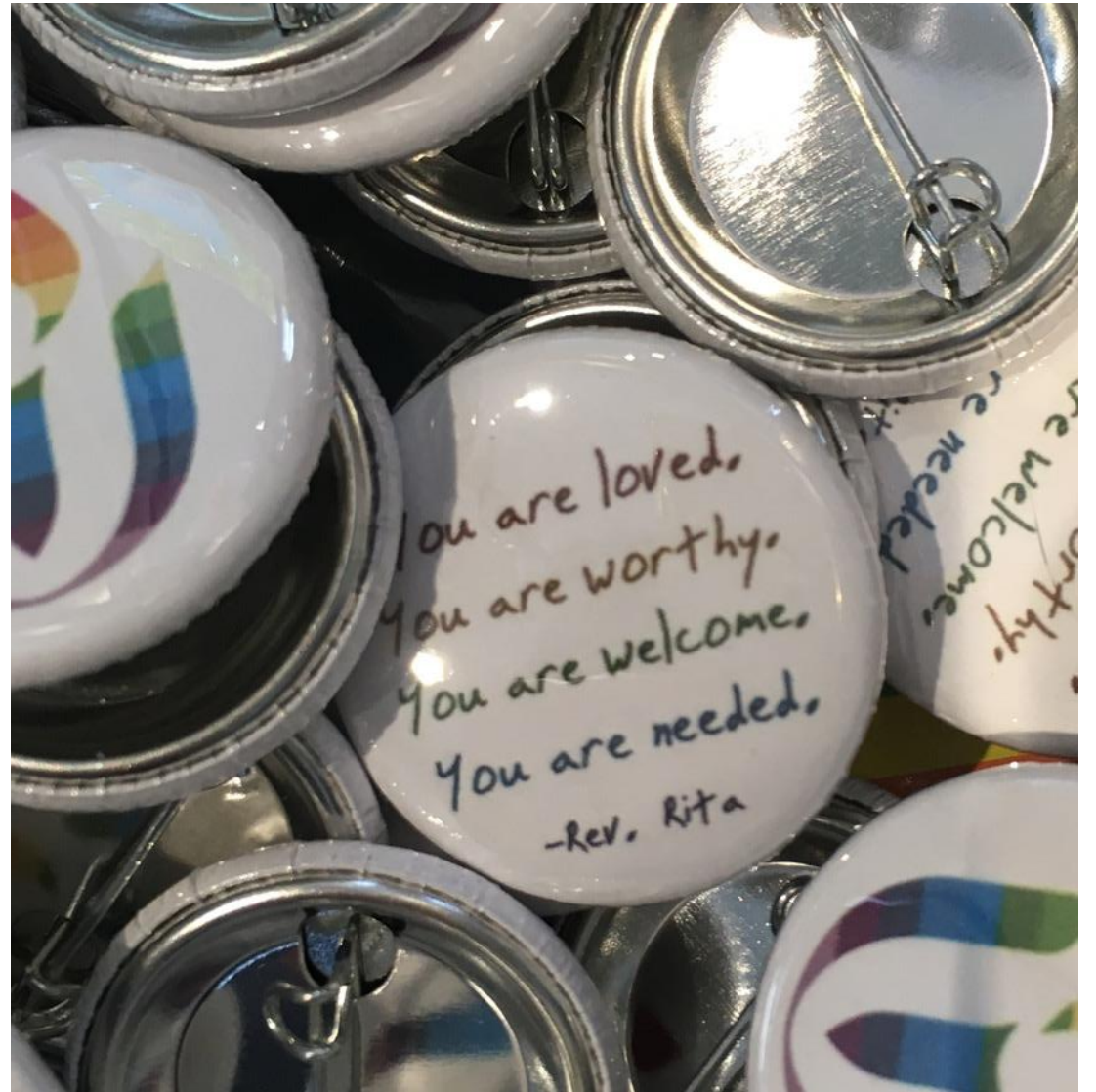
You need to look at all you ARE and all you do with the understanding that you are enough. More than enough.

You have some work ahead on shared direction, governance and finance. But it is not impossible work. You can do it.

Learn to talk about money.

Be patient with yourselves and each other.

You are needed in so many ways!





Next Steps

1. Have fun together! Take your time. You've done hard things.
2. Move forward to create and finalize shared Vision and Mission Statements.
2. Develop a set of congregational priorities and set some goals around them you can check in on.
3. Invest in Religious Education.
4. Have a face-to-face annual pledging campaign – next spring, not this year.
5. Create a 5-year Strategic Financial Plan based on your priorities and goals. One that leads you to a balanced budget.

NOTE: Don't do this all at once!!

Some people are used to keeping rules; don't cross the street when the light is red, only sensible. It turns out that keeping rules isn't the same as keeping covenant, which asks us, instead of keeping a bright line, to keep our Promises.

To what have we promised ourselves? To this moment in time and place. To this community and even, tenderly interconnected, this planet.

We promise ourselves to the idea that we are each and all human beings. We promise that there is something moving between us that we cannot tame and cannot measure. The chalice is a reminder that what flame we keep inside us cannot light the way. The light must spill to shine.

The thing you must be is yourself.

Unadulterated, shedding the willingness to journey alone, as though you are made of something hard and unforgivable. You are human. You belong, right here, right now. And together, we will chase away

the sickness, the secrets, and leave only the open

Possibility that the future is a space for growth





Thank you for all you are and do!