



# UNITARIAN UNIVERSALIST CHURCH OF BERKELEY

## Next Steps Stewardship Consult September 2025



Kay Crider, KCU Consulting LLC

**Stewardship FOR US**

*Building Cultures of Generosity and Commitment*

# My Background

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- 24 years of professional fundraising experience
- Stewardship for Us Team
- Unitarian Universalist for 32 years
- Passionate about helping you fund your mission, vision, programs and building projects!





# My Time with UUCB



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- Reviewed lot of data in advance; conversations started in December
  - Meetings this week & weekend
    - Board, Staff, Ministers, Endowment, Stewardship, Finance, Building & Grounds, Family Ministry, Justice teams, Membership
  - See/hear how you are doing & your goals
  - Recommendations for moving forward

# Greatest Strengths

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(from online survey)



**Sunday Services = 66%**

**Minister/Staff = 63%**

**Community/People = 41%**

**Social Justice = 39%**

# Greatest Challenges (from online survey)

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Volunteer  
Growth

41%

Facilities /  
Buildings

52%

Membership  
Growth

56%





# Top Priorities (from online survey)

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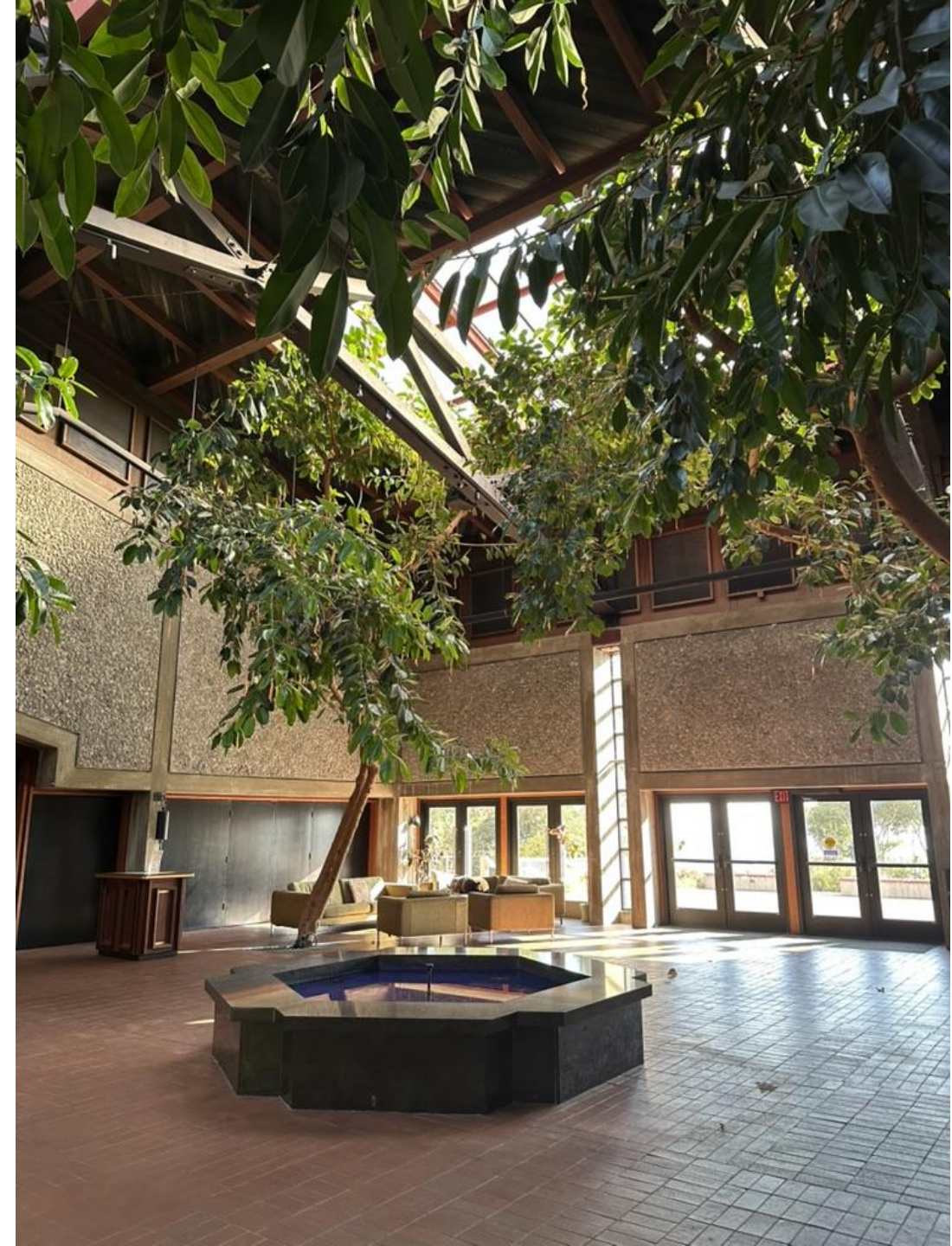


- Membership growth – 49%
- Facilities / Campus – 43%
- Social Justice – 24%

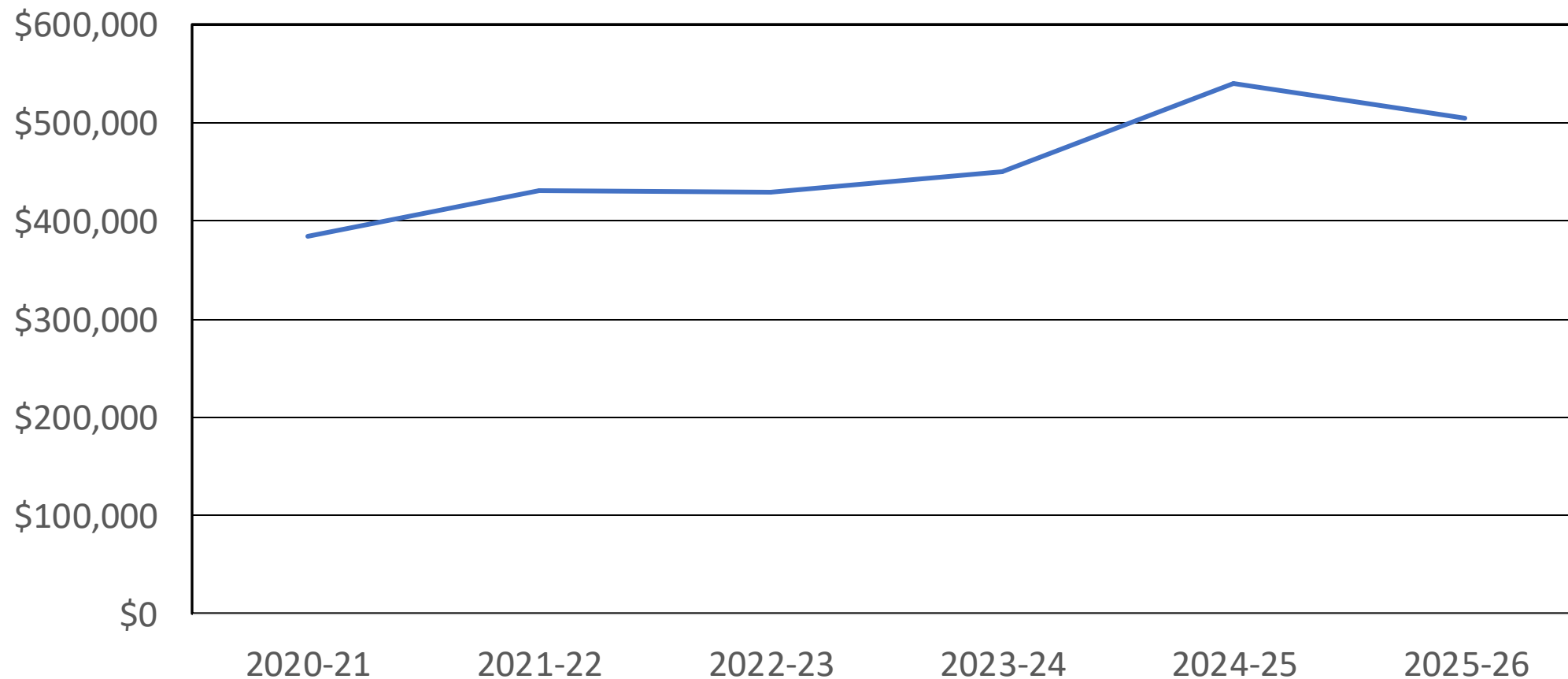
# Support for Capital Campaign

(from online survey)

- 91% said Yes
- 9% said No
- 75 of 79 answered Q



# Pledges 2020-2026







# Annual Pledges

2025-26

**Average Pledge**

**\$2,841**

**Median Pledge**

**\$1,200**





# Pledge Ranges for 2025-26

Percent of Pledges	# of UUCB Households	% of UUCB Households	Giving Ranges Yearly Amounts
25%	6	3%	\$13,600 - \$30,000
25%	14	8%	\$6,500 - \$12,500
25%	32	18%	\$2,550 - \$6,000
25%	126	70%	\$60- \$2,520

# Readiness for Capital Campaign

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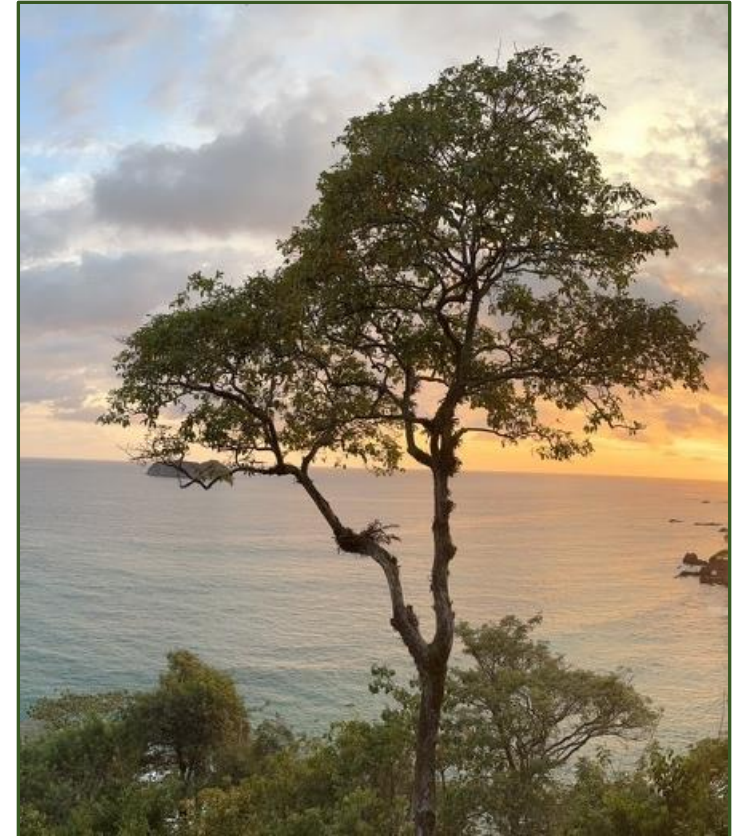


- A compelling Vision and Plan
- Awareness of need(s) by congregants
- Sense of urgency
- Consensus on your path forward
- Engaged congregation with low conflict
- Healthy Annual Stewardship
- People willing to make it happen!

# Guidelines for Capital Campaign



- Typical range is 3x-5x your annual giving
  - \$505,705 annual giving
  - = \$1.5 Million to \$2.5 Million
- Some outlier results in recent years
  - 6.5, 8 and 9.75 & 10x annual giving
  - = 7x annual giving - \$3.5 Million
- Pledging over 3-year period
  - usu.  $\geq 50\%$  given in first year





# Potential Loan Guidelines

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- UUA and some lenders set maximum annual debt service at 25% of annual budget
  - UUA -year treasury rate + 3%; \$50K to \$900K range; 5-year term with 15-year amortization; must be APF Honor Congregation to apply
- Realistic long-term debt service is <15% of annual budget
  - 15% of \$1.25M is \$187,500; still a lot to absorb unless income plan
- \$1M loan over 20-years at 6.6% is \$90K/year or 7% of annual



# Tips to Get There

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- Lead gift of *at least* 20% of total
  - \$400K for \$2M
  - \$600K for \$3M
- An even larger cornerstone gift can be transformative & inspiring!
- Need financial, intellectual, and spiritual buy-in tied to shared vision

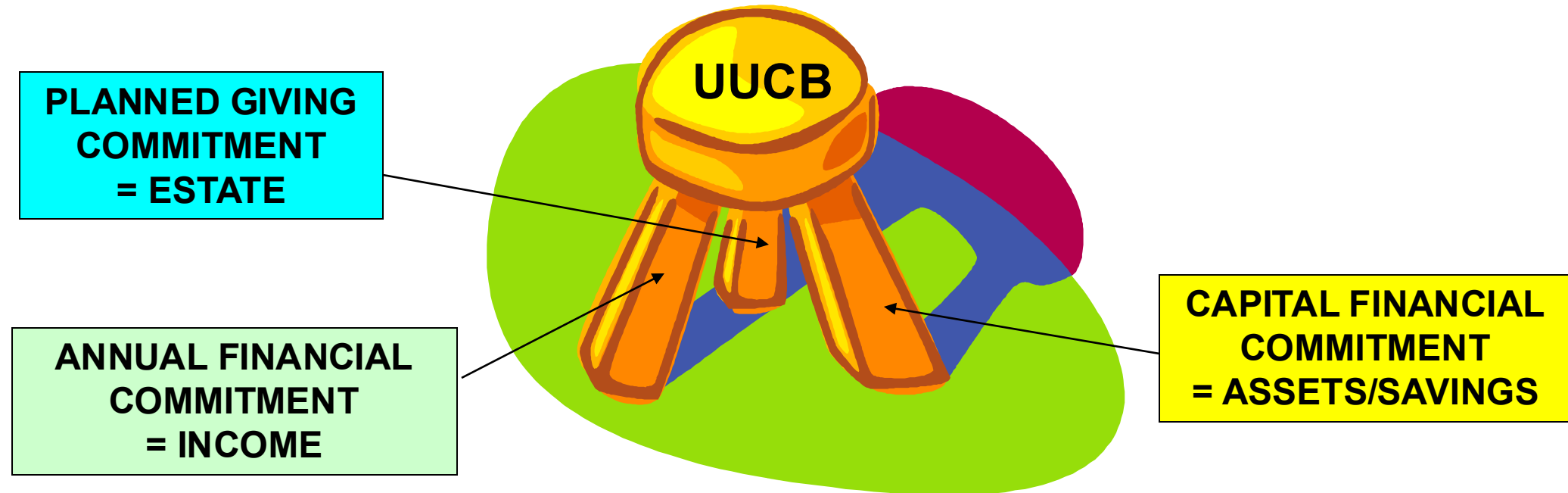
# Funding Programs & Building

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- Continuing annual support is essential
- Annual funding takes priority over capital if a household can only give to one or the other
- All size gifts are important and appreciated!
  - The range is large for a capital campaign
  - Time, talent and treasure are all valued

# 3 Areas of Giving







# Phases of the Process

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- Next Steps Consultation
- Follow up on recommendations
- Financial Feasibility Study
- Refine Scope of Project if Needed
- Capital Campaign

# Compliments



- Settled, young, flexible, kind, smart, beloved minister from the area!
- Amazing campus with abundant space both indoors and outdoors
- Fully emerged out of pandemic
- Investing in RE program post-pandemic – essential!
- Multi-faceted evolving justice work
- Trusted, highly dedicated building and grounds experts
- Superb rental income
- Covenantal interactions between volunteers and excellent staff

# Observations

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- A lot of change in recent years
- Some trust issues due to past
- At beginning of discernment of vision and how building supports that vision
- You have many dedicated congregants that can help you achieve your goals





# Some Ideas Mentioned

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- Tiny house village to serve the wider community and justice work
- Better sound and lighting for social hall
- Green energy for entire campus
- Redesigned playground for UUCB families and Good Earth School
- Separate new structure for retreats, meetings, after school program
- More light and bringing outdoor views into sanctuary
- More tech space / sound booth for sanctuary
- Accessible, modern bathrooms off Atrium ...





# Recommendations

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- Do visioning for what you want to be
- Discern how campus supports that vision
- Estimate costs
  - Necessary deferred maintenance
  - Additional items that help you live out vision and are more than just fixes
- Give yourselves time to plan well, engage the congregation and build momentum



# Big Picture Timeline

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- Fall/Winter 2025: Visioning together, next 5-10 years for programmatic priorities; discern how campus upgrades support that vision
  - Distill options for future potential renovations or additional space; estimate costs
- Winter/Spring 2026: Engage together on building options
- Summer 2026: Financial Feasibility Study (FFS); wrap project around results
- Fall 2026: decide/vote how to move forward; campaign planning
- Winter 2026: Continue campaign planning; leadership phase
- Spring 2027: Combined Campaign

# Looking Ahead

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- Hold each other in covenant as you move forward, especially in today's world
  - ✓ Listen attentively
  - ✓ Express appreciation often
- Opportunities for input and dialogue are very important
- UUCB has many positives – you can do it!



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## Closing Words

Make no little plans.

They have no magic to stir the blood and probably will not be realized.

Make big plans. Aim high in hope and work, remembering that long after we are gone our work will continue to be a living thing.

Remember that our children and grandchildren are going to do things that would stagger us.

So, make no little plans. ~ Daniel Burnham



# Questions?

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Thank you!

I hope our time together was valuable to you.

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