

NYSCU GRANT PROGRESS REPORT

This report of a 2025 grant received from the New York State Convention of Universalists in is due to Tom Hackett, Clerk, 70 Wall Street, Kingston, NY 12401, or electronically to NYSCUTom@gmail.com, ON OR BEFORE 30 SEPTEMBER 2025 .

If there is a visual component to the program, please send a photo or two (labeled, please) or other appropriate visual. If there is an audio or video component, please include as well.

Note: If your project is not yet underway or is just beginning, you may defer your report until 2026. Please inform the Clerk at the above address if this is the case.

ORGANIZATION: First Unitarian Society of Ithaca

DATE OF REPORT: September 30, 2025

PURPOSE OF GRANT: Together We Rise stewardship initiative.

AMOUNT OF GRANT: \$5,000

1. How was the money actually spent?

The funds were used to pay all consultant fees to Reverend Lydia Ferrante-Roseberry, a consultant from the Stewardship for Us group. Rev. Lydia visited our congregation and gathered information by surveys, meeting with multiple teams and committees, and conducting congregational conversations. Rev Lydia wrote up her findings and presented them to the leadership, offering many suggestions to improve our stewardship in the future. Rev Lydia also made a separate presentation to the congregation, as a first step to help educate the congregation on our finances and to help us start being more transparent and open with congregants around finances (one of Rev Lydia's recommendations).

To improve our Stewardship participation and pledge amounts, Rev Lydia recommended a campaign that focused on one-on-one conversations between trained Stewards and congregants. Rev. Lydia's made a return visit that included an in-person training session for 18 volunteer Stewards and a similar follow-up session by Zoom for 2 individuals. Stewards learned the theory and best practices for one-on-one engagement to help congregants feel heard and valued as well as to ask for a generous pledge. Throughout the Stewardship campaign, Rev. Lydia stayed in touch and offered suggestions for mitigating challenges and/or improving success.

2. By your best estimate, how many people were/are being reached/served?

Our whole congregation of 259 members and 200 congregants were reached/served either directly or indirectly.

The whole congregation was exposed to the campaign messaging of our 'Together we Rise' pledge campaign.

The 20 Stewards received in depth training and coaching from Rev Lydia to benefit not just last year's campaign, but also future years.

The trained Stewards contacted close to 90 congregants and had follow-up in-person meetings with most of them.

We sent letters to the remaining members/congregants (our standard approach including previous pledgers and never-pledged recent arrivals).

All of our members/congregants benefit from the money raised.

3. How well have the *goals* of the program/project been met, and how has this determination been made?

In terms of this year's pledge campaign, the goal was to learn and apply a new approach to Stewardship in order to increase our funding now and in the future. The campaign target was \$350,000, an ambitious \$30 k increase over the previous year's target. With the same number of pledging households as last year (149), we ended the spring pledge campaign with \$337,579. While this is short of our goal, our methods were successful at growing the total proceeds (\$320,502 last year) and the number of households that increased their pledge from the previous year. This year 80 households (54%) increased their pledge, compared with 71 (48%) last year. According to Rev. Lydia it can take longer to realize the full impact of this new type of stewardship and it tends to build year after year. We are now equipped with more information and skills in which to conduct future pledge campaigns. By continuing to use these new methods and scheduling the one-to-one meetings with individuals we weren't able to meet with last year, the results of this training should continue to grow into the future.

4. What *concerns* developed in the course of the program/project?
We have a vulnerability in having a highly skewed distribution of household pledge amounts, with folks at the high end of pledges being elderly and 120 households are not currently pledging (nearly 50%). Unfortunately, this cannot be corrected in just one pledge season, but with all the advice and training of Rev Lydia, we do hope to see more and more benefit in the coming years.

5. Is this program/project complete?
The spring campaign is complete and by comparative metrics with recent years it was a success. We consider the one-on-one visits by Stewards to have been successful not only with respect to pledges, but also strengthening our congregation. This year's visits focused on the most consistent pledgers. The campaign next year will employ similar methods but focus on congregant households with sporadic or no pledging history. In addition, much ongoing work is focused on developing additional sources of revenue.

A. If no, when will it be completed and evaluated, and by whom?

B. If yes, what are the implications for the future?

- C. In addition to the changes in how we conduct the pledge campaign, Rev Lydia offered many suggestions to improve overall financial security. As a result of her expertise we are creating a development team who is tasked with designing a planned giving program, we have increased pledge education by having members talk about why they pledge during service, we have begun removing the stigma around talking about money by including more regular conversations with the congregation on financial issues and we have resumed our new member onboarding with a presentation about the importance of pledging. All of these methods together will continue to strengthen our congregation and help grow our financial stability over the coming years.

6. Would you do the program/project again, or recommend it to others? Explain.
Yes! In addition to teaching us a new method of effective pledge campaigning, the consultation with Rev. Lydia made a number of suggestions (mentioned above) to increase our church in the future.

Name of respondent: Michelle Waffner

Address: 306 N. Aurora St Ithaca, NY 14850

Phone: 607-273-7521

Email: office@uuithaca.org

Thank you!