

Developing Strategies to Strengthen OCWM Basic Support

By Andrew Warner, Generosity Outreach Officer, OPTIC

This project began with the question, “what can we do in the national setting to strengthen the OCWM Basic Support offering?” Throughout the fall, I raised this question with over twenty stakeholders, primarily conference ministers and other conference staff across the UCC. Before moving to a set of strategies, I developed a SWOT analysis for OCWM Basic Support based on my initial conversations and continued to adapt it with new input. Then I imagined a set of strategies that we could try in both conferences and the national setting, sometimes individually but often collaboratively. These ideas constitute a “menu” of options because of the diverse needs and capacities of our settings. I hope that leaders will choose a set of initiatives that match their appetite. Acting together, we can each strengthen OCWM Basic Support.

	Helpful	Harmful
Internal	<p style="text-align: center;">Strengths</p> <ol style="list-style-type: none"> 1. OCWM Basic Support provides the primary and key philanthropic support for the conferences and national setting of the UCC. 2. OCWM Basic Support, as part of the OCWM umbrella, is a widely recognized term by most church leaders. 3. OCWM Basic Support is the most durable and widely used philanthropic offering in the UCC. Decades of support and General Synod resolutions speak to its historic place in the UCC. 	<p style="text-align: center;">Weaknesses</p> <ol style="list-style-type: none"> 1. Conferences and the National Setting are experiencing relational challenges, marked by strained trust and experiences of disappoint, frustration, lack of appreciation, and exasperation. Key donors – i.e. conferences – lacking trust should be taken as a major warning light for the national setting. 2. While OCWM is a recognized name, a significant lack of clarity around the purpose and use of OCWM Basic Support abounds and how “OCWM” differs from “OCWM Basic Support” and the four special offerings. 3. Teaching regularly about generosity correlates to increased revenue; but across the UCC we typically only teach about generosity once a year during an annual appeal (stewardship campaign).
External	<p style="text-align: center;">Opportunities</p> <ol style="list-style-type: none"> 1. We can learn from the best of nonprofit business insights: e.g., the importance of cooperation over competition in the nonprofit sector; the importance of being donor centered (national on conferences; conferences on congregations). 2. New and robust ways to engage donors and receive gifts exist in the wider philanthropic world; both peer-to-peer (small gifts) and planned gifts (full range of gifts) could be explored. 3. Leaders in each setting of the church are experimenting; embracing both a scrappy tenacity and a playful adaptivity in order to meet challenges. 	<p style="text-align: center;">Threats</p> <ol style="list-style-type: none"> 1. The various capacities, resources, and environments of conferences and national setting could lead to a very different UCC, one in which the national setting operates more as a foundation (or an endowed think-tank) with a much smaller footprint, some conferences become para-church organizations serving multiple mainline congregations, others regional bodies, and some close. A similar evolution (devolution) is happening/happened with our seminaries and camps. 2. While Americans remain deeply generous, the motivations and methods of giving are changing rapidly. The old slogan of OCWM – “It’s what we do” – will not work. 3. Both in society and church we face a mindset of scarcity.

Menu of OCWM Basic Support Strategies

One solution will not fit the diverse situations of our conferences and the national setting.

Starters:

Less complex to implement changes that strengthen OCWM Basic Support

Teaching the “Spirituality of Generosity”

Creating worship resources for pastors and leaders to teach about generosity.

Messaging

Moving to just speak of “basic support” and developing a tagline like, Because of your gifts, together we change lives.”

Capacity Building

Provide a variety of educational events – both in-person and web-based – for pastors and leaders; offer Executive Certificate in Religious Fundraising to Conference leaders.

Goal Setting

Approach OCWM Basic Support donors (congregations and conferences) with suggested gift amounts (i.e., goals).

Segment Donors

Segment donors and develop communication plan for each tier.

Prix Fixe:

An “entire meal” solution worth consideration

Dues and OCWM Basic Support Replaced with Percentage Giving

This approach from the Southern New England Conference may be the appropriate for many conferences to adopt.

Mains:

More complicated to implement changes that strengthen OCWM Basic Support

Joint Conference-National Case for Support

Instead of separate conference and national cases of support, develop a joint case of support driven by the priorities and situation of the conference.

Curating Communication

While we have many communication vehicles, many don’t effectively reach the “person in the pew.” Consider a much more robust series of videos.

Gratitude

Do we thank the donors in the ways meaningful to them? Do we thank people as often as we make asks?

Double Pledge Cards

In a significant number of congregations, members make one pledge to church and one to OCWM; we need a specific strategy for these congregations.

Board Role in OCWM Basic Support

Board service changes lives, in part by widening our hearts, by listening to God’s call, and by shaping an institution according to the Gospel

Sharables:

Fundraising arises from relationships

1:1 Visit: CM or “Ambassador” & Local Church

Whether by CM or by a designee, visits can deepen relationships.

National “Visits” into Conferences

Conference could leverage national staff visits for philanthropic support of the conference.

Sides:

Good things to try alongside more focused initiatives

Congregational Leadership Changes

We can learn together how best to attend to pastoral transitions so that we don't see a significant OCWM Basic Support drop-off.

Database

Many conferences could use new or improved databases; could conferences partner together or use a cost-effective option. Making these choices together would allow people to learn from each other.

Expand Donor Options

Provide easy to use infographics such as promotions of wills and bequests, charitable gift annuities, and IRA charitable rollovers.

New Infographic for Budgets

Narrative budgets 2.0 fold administrative expenses into program (mission priority) costs.

Desserts:

Ideas beyond OCWM Basic Support (other ways to ask for operational support)

Friends of the Conference & National Appeal

Conferences and national might consider a combined annual appeal; most effective if our lists don't overlap much.

Capital Campaigns

Capital campaigns – beyond raise crucial funds – often educate church members about the practice of generosity.

Giving Circles

This classic strategy could have a place in the UCC: imagine a giving circle of UCC donors each giving a \$1000 and together awarding a grant (i.e., like Impact 100).

Peer-to-Peer

Peer-to-peer provides our constituents the tools to raise funds for shared priorities – see the UUA's www.faithify.org for an example of how this works.

Congregational Grants

A conference or the national setting could develop a common grant application to circulate funding ideas among congregations with endowments that fund projects beyond the local church.

A Note about the "Kitchen" (i.e., the context of making change):

We face clear adaptive challenges, from the rise of the "nones" to shrinking rural communities, increasing political polarization, and the changing mores of generations. Despite these adaptive challenges, this document mostly lays out technical fixes because we need to establish the depth of trust and connection between the settings of the UCC that will allow us to engage adaptive challenges together.¹

Numerous stakeholders identified issues of trust in the relationship between the conferences and the national setting. Moving OCWM Basic Support forward requires attending to this issue. Trust provides us with the capacity to make necessary mindset shifts: from scarcity to abundance, from acquisition to generosity, and from competition to cooperation. While using philanthropic best practices will help strengthen OCWM Basic

¹ Adaptive challenges (problems we don't yet know how to solve) and technical fixes (applying the knowledge we have to problems) come from Ron Heifetz's work on organizational leadership such as [Leadership without Easy Answers](#).

Support, the critical task remains developing trust between settings of the Church so that we can face our more substantial and more challenging to solve adaptive challenges.

Starters:

Less complex to implement changes that strengthen OCWM Basic Support

Teaching the “Spirituality of Generosity”:

Recent research on the finances of congregations throughout the county by the Lake Institute of the School of Philanthropy at IUPUI pointed to the central importance of teaching about generosity. The authors of the study note, “Among congregations that teach on giving weekly (9%), 90% reported financial growth. Among those discussing giving monthly, reported financial growth was 73%.” Yet often in the UCC, we ask for donations (or pass the plate) without explaining why someone should make a gift as part of their discipleship.²

Significant growth in OCWM Basic Support will not happen without strengthened local church revenue. Conferences and the national setting can prioritize teaching about the spirituality of generosity. As Lake Institute research confirmed, consistent and regular lessons about generosity correlates with increased congregational revenue.

Focused attention on this might include:

- Developing liturgical year resources on generosity (expanding out the material created for Inspiring Generosity many years ago), including webinars or sermon preparation materials for a once-per-season sermon on generosity.
- Embedding OCWM Basic Support “gratitude moments” or resources such as mission impact stories into the Worship Ways materials (perhaps as an additional page added to the existing Word documents).
- Clergy retreats created collaboratively by the national setting and conferences on the spirituality of generosity.
- Ensuring the Still Speaking Devotional regularly includes a reflection on generosity.
- Reclaiming decisions and discussions about finances as spiritual questions (instead of leaving them as pragmatic, necessary, and fiduciary ones).

Messaging:

Considerable confusion exists between OCWM as the umbrella of the five offerings and OCWM Basic Support. We need a new language. It might help to drop "OCWM" from "OCWM Basic Support" (e.g., talk about "Basic Support").

We’ve also tried several tagline phrases over the decades (i.e. “OCWM: It’s What We Do”). Each tagline worked in its moment. Thus, “OCWM: It’s What We Do” appealed for donors giving out of a loyalty orientation. Others wonder: what do we do? We need a new unifying theme for promoting the mission and ministry funded by OCWM Basic Support. Perhaps, “Because of your gifts, together we change lives.”

Capacity Building:

² Learn more about the National Study of Congregations Economic Practices at www.nscep.org/reports.

Fundraising remains an area where many leaders in all settings express a need for training and support. Many congregational leaders name a profound awkwardness around discussions of money. In the Lake Institute study, only one in four congregational leaders know what people give to their congregations (informed leadership is always a best practice).

The national setting and conferences can partner together to address the capacity building of leaders:

- Providing the Cultivating Generous Congregations program of the Lake Institute to pastors and congregational leaders (costs approximately \$300 per person trained with costs shared between national, the conference, and participants).
- Supporting key conference leaders, senior pastors of our largest congregations, and directors of conference camps in attending the Executive Certificate in Religious Fundraising at the Lake Institute (approximately \$2000 per person trained).
- Developing a set of web-based and in-person training options, especially ones aimed at the Boards of Directors of Conferences to build a culture of generosity on the boards. CHHSM may be able to mobilize directors of development in the network of UCC related agencies to amplify the efforts of OPTIC.
- Broadening the resources available for local congregations conducting annual campaigns (e.g., less focus on a novel new theme for Stewardship materials and more attention to the toolkit for running a successful campaign).

Goal Setting:

Many conferences and the national setting do not suggest goals for OCWM Basic Support despite the industry's best practice of suggested gift amounts. Ideally, the goal-setting process would be a dynamic and dialogical one between congregations and their conferences and between the conferences and the national setting. Goal setting happens along a continuum of engagement; while dialogue about a goal would be best practice, conferences and the national setting could make meaningful progress from where they are now towards a dialogical approach (i.e., if a conference doesn't set goals for congregations, it could start).

No Goal:	Set Goal:	Reason for Goal:	Dialogue about Goal:
Many conferences and the national setting start at this space: no goals for donors.	Key leaders/volunteers review the “ABC’s” of a prospective donor (alignment, belief, capacity) and develop a suggested goal to send to the donor.	The communication about the goal affirms the mission and ministry of the local church/conference, names the impact of past giving, and asks for a future gift with reasons set out for the goal.	Wherever possible, top leaders/volunteers engage the donor in conversation about the suggested goal and follow up as to the decision.

Segment Donors:

Local congregations vary greatly, not just in size but in imagination. I know of two congregations with about eight in worship on Sunday. One congregation prepares to close, wondering if they can make it through the winter because they can't afford a new boiler. The other organizes community meals five times a week,

hosting neighbors from the trailer park next door and providing a lifeline to desperate families through the winter. Just as our smallest churches can vary, so too with our largest congregations: sometimes insular, sometimes missional, sometimes stagnant, sometimes thriving. Given the variety in our local congregations, segmenting donors can be a useful tool.

Begin with creating two donor pyramids: one by total dollars given and the other by per capita gifts. Segment each as follows: the top 10%, the next 20%, the remaining 70%, and outside the pyramid, those that don't give. Discuss in a staff or board/team meeting specific strategies and approaches to each segment. Segmenting donors isn't just about sifting out the wealthiest; instead, it allows organizations to tailor an approach to the needs, capacity, and identity of the donor. Segmentation allows us more effectively personalize communication.

Note: You will also want to identify congregations using a "double" pledge card: one for the congregation itself and what the congregation gives to OCWM. We need to approach these congregations with a specific strategy for their situation (see Mains: Double Pledge Cards).

Mains:

More complicated to implement changes that strengthen OCWM Basic Support

Joint Conference-National Case for Support:

Conferences and the national setting currently make two independent cases of support for OCWM Basic Support. Sometimes both conferences and the national setting struggle to keep the case current, relevant, and focused on the needs and concerns of donors. Making a single ask of donors from separate cases of support only sows confusion. We might compare it to conducting a congregational capital campaign with a brochure developed by the Deacons and another by the Mission Committee with both delivered by a Trustee.

A better way forward would be to develop a unified case of support, one in which the case for the national setting become folded into the case for the conference. Articulating the case this way reflects the "shared" ask and may build a stronger sense of collaboration between the settings of the UCC. Working collaboratively with the breadth of conferences would be time-intensive, but not necessarily more cumbersome than individually creating case statements.

Curating Communication:

One would think that with Keeping You Posted, UCCnews, Facebook, #UCC, JPANet, the Mystic, Sacred Conversations, and more, it would be easy for pastors and conference leaders to find compelling OCWM Basic Support stories to share. Nonetheless, conversations with key stakeholders consistently revealed that our communication methods are not reaching the people we most want to equip for them to make the OCWM Basic Support case.

Much of what we provide under the heading of OCWM remains dated or ineffective. A ucc.org search of "OCWM" turned *interesting* (and often dated) results, including an "OCWM Newsletter" published by the national setting until Dec. 2012. Other results included bulletin inserts for use by local congregations that spoke broadly using in-house jargon about the impact of OCWM Basic Support; each insert bore the title "changing lives" even while speaking of other core values. A similar search of the "T-drive" of the national

setting revealed similarly dated material, most created in 2013 or earlier. Too often, we substitute ten bullet points for one compelling story. The national setting can do better.

The national setting could see conference leaders as an essential audience, the conference minister as a strategic partner, and test all methods by how "the person in the pew" would access them (which means testing the search results from the home page of the national website).

Conversations with stakeholders generated a few ideas for what would be helpful; each needs to be short, concise, and focused on one compelling story:

- 2-minute video clips on one aspect of OCWM Basic Support that could be played in worship or included in the email response to online donors at the congregation, conference, and national level.
- We might take a note from the for-profit world, which produces effective and personalized videos such as those for people who join Manchester United's fan club. Within 24-hours, the new member receives a video in which their name repeatedly appears on things like a jersey, a locker, and a certificate signed by the general manager. While that might be out of our ability, perhaps we could create a Jacquie Lawson style card: <https://www.jacquielawson.com>.
- Fifty-two examples of "OCWM Basic Support Impact" from national that could go into congregational e-newsletters, print newsletters, and bulletins could be helpful.
- The Southern New England Conference produces a regular "5 things you need to know" email. A version of this sent to conference staff or volunteers responsible for e-newsletters might be a helpful tool for sharing key national setting impact stories.
- A set of stories – perhaps shared by conferences – that tell the impact of search & call, fitness review, and other regular and core work of conferences without breaking confidentiality.
- The Missouri Mid-South Conference produced a series of memes related to OCWM Basic Support by asking congregational leaders what the offering meant to them at a conference gathering and then turning these quotes into easy to share graphics.

The national setting and conferences may want to look at the budgetary investment into OCWM Basic Support promotion relative to the financial return in the offering. It seems we spend the least amount of resources on promoting and resourcing our single largest source of income.

Gratitude:

We've long used the phrase "your OCWM dollars at work," but this may not be communicating the appreciation for our congregations, conferences, and national setting colleagues. We can look for opportunities to name to the donor the way the mission and ministry of their setting of the UCC matter to the whole body and to make clear that we both know and care about the donor.

Appreciative Process and Notes: At both the conference and national settings, we could engage staff and volunteers in an appreciative inquiry process. Within conferences, a Board of Directors or staff activity might include brainstorming the unique contributions of a congregation to the life of the conference and then having volunteers write to crucial church leaders a note that names the way the congregation is a gift to the United Church of Christ. Conference staff and board members working together could write a handwritten appreciative letter to the top leader of each congregation. A starting point goal might be ensuring every pastor in the conference receives a note on their ordination or installation anniversary.

At the national level, staff volunteers could likewise brainstorm the unique contributions of each conference. They could then write conference leaders appreciative notes for their ministry, including the commitment to pray for their work. If 1/3 of the national staff participated, writing four letters a quarter, we could send handwritten notes to conference leaders 3-4 times a year and at least once a year to the top 5% of per capita OCWM Basic Support congregations.

Thank You & Remember: When I served as a local pastor, I received a quarterly invoice from my conference stating how much the congregation had given towards its OCWM Basic Support pledge and any other offerings. Even my dentist sent a better payment reminder. While we need to update top leaders on the giving of their congregations, we would do better to preface those reminders with a letter naming the impact of the congregation's gift or pledge. To share the responsibility for creating those letters, the national setting officers could each write one letter. Those 3, along with one from the conference minister, would make it easy for conferences to send a more meaningful "thank you and remember" letter.

Double Pledge Card:

Some congregations receive a "double pledge card," one for the local congregation and one for OCWM Basic Support. This presents a real challenge to conferences and the national setting because we do not know the names of these individual donors and, therefore, can not make a case for support or steward their engagement. It would be worth the effort to work with congregations using a double pledge card to migrate those donors to the "friends of the conference" while giving "soft credit" to the local congregation. A similar approach might be useful with congregations making very modest per capita gifts. A pastor who found it hard to increase the budgeted OCWM Basic Support may be able to find some members who would make individual gifts to the conference or national setting.³

Board Role in OCWM Basic Support:

Conferences and the national setting could look at the role and function of the board concerning OCWM Basic Support. Given the vital role of OCWM Basic Support in the conference and national budgets, it may be appropriate to create a committee focused on this offering. Developing the culture of generosity in a board involves clarity about why we serve, recruitment with clear expectations, and naming fundraising as part of the scope of board work.

Why We Serve: Board service changes lives; this can be the first and most important message of naming the role of board members. Not other peoples' lives, but our lives change by widening our hearts, by listening to God's call, and by working to shape an institution according to the Gospel. Named this way, the kind of board service we need in the Church differs from what people commonly experience. Too often, boards come together as "legislative" bodies to make the rules (which is encouraged by the election of board members) or "policing" bodies to ensure leaders keep the rules (which is reinforced by the reviewing of reports). While representing constituencies and making and observing policies matter, boards at their best act like a band of disciples. Through board service, these disciples develop the spiritual practices of transparency, integrity, generosity, and leadership. This lens of "changing lives" reframes board giving from an "obligation" to an opportunity for growth. Board giving deepens our practice of integrity because we don't ask for what we won't do ourselves. It also strengthens our practice of generosity because care for the mission of the organization naturally leads to it becoming one of the top three charitable priorities in our household, right after the local congregation.

³ Based on materials ordered from the UCC Resources Store, I would estimate that 10% of our congregations use a double pledge card.

Recruitment: Recruiting board and committee members begins with identifying the capacities and competencies needed. Teams working on OCWM Basic Support need two essential skills: people who embrace generosity as a spiritual practice (or mark of discipleship) and good storytellers. (Hint: the quarterly reports on donors to national and the annual reports of CHHSM agencies can be a good starting point for new ideas for team members).

A few questions may help ferret out these skills:

- Tell me about your strategy for making charitable gifts. How do you decide to whom to give? Which Biblical stories shape your choices? (Asking this question helps identify the *thoughtfulness and intentionality* with which someone approaches giving; in my experience, this is a clear mark of approaching giving as a spiritual practice).
- Tell me about a gift you gave to a nonprofit. What impact did this have on your own life? In the lives of those served by the nonprofit? (Asking this question helps identify the *ability to tell stories* that communicate the impact and mission of an organization).
- Tell me what engages or excites you in the mission of our organization. (Asking this question helps indicate the *depth of understanding* in your organization).
- Tell me about a time when you asked for a gift to support a project that mattered to you. (Asking this question touches on the *capacity to make an ask*).

Scope of Work: The board or committee working on OCWM Basic Support has several key conversations:

- Generative: Articulating the case for support, an internal document/discussion to guide their work throughout the year. This conversation can take place at the first meeting of the year for the team; reviewed and reflected in a fun way at the annual meeting, and revisited whenever writing the communication to donors.
- Strategic: Understanding key donors, the changing landscape of philanthropy, and the priorities of the institution's efforts. The team can review (in late June) the annual Giving USA Report to learn what's changing in the field of philanthropy; a development director from an affiliated nonprofit or CHHSM agency might be a useful guest commentator. Lastly, the team will want to keep an eye on what's working and not in the organization's efforts.
- Practical: Focused attention to the regular tasks of donor engagement. This work includes several steps of donor communication, including: quarterly letters thanking the leaders for the donations of their congregation; goal setting; handwritten notes (1-2 a month per team member) lifting up the ways the congregation's ministry is a gift to the UCC (hint: check website before writing and be specific about what you appreciate).

"FROM MY EXPERIENCE, ORGANIZATIONS THAT LIMP ALONG FROM ONE FINANCIAL CRISIS TO THE NEXT ARE USUALLY THE VICTIMS OF BOARDS WHOSE MEMBERS LACK AN IN-DEPTH UNDERSTANDING AND INADEQUATE UNDERSTANDING OF THE HOLISTIC ROLE OF FAITH AND HEART TRANSFORMATION AS THE PATH TO GENEROSITY."

- REBEKAH BASINGER

Prix Fixe:

An "entire meal" solution worth consideration

Southern New England Percentage Giving:

The Southern New England Conference (nee Massachusetts Conference), like many conferences, relied on both per-member dues and an overall gift to OCWM Basic Support ([learn more about this approach](#)). The conference created a program – the United Church Appeal – as an option to replace both dues and OCWM Basic Support. Congregations covenanted with the conference to maintain a certain percentage of giving, say 5% of local church expenses. The conference covenanted to help congregations grow their base of financial support. Both rose together. This approach may well suit many of our conferences to move past a system of dues-and-OCWM and to make a clear value-added statement: we grow together.

Sharables:

Fundraising arises from relationships

1:1 Visit:

As one church growth mentor said, "ministry is a contact sport." We grow congregations by engaging with people, not merely waiting for them to arrive at our imposing door, step inside, introduce themselves, find their way to the Christian Education class, and call the pastor. Likewise, with fundraising: we need to build relationships with donors, both individuals and institutions.

Conferences might consider one of several approaches in this regard. Felix Villanueva in the Southern California Nevada Conference organized a program of "ambassadors" to visit each local congregation willing to receive them. The ambassadors came from the conference board and a pool of recently retired pastors. They visit congregations, learn about their mission and ministry, and share the story of the conference.

The national setting once essentially ran an "ambassador" program. Members of the old corporate boards served six year terms. They committed to visiting six congregations a year. The ambassadors gathered occasionally. The visitation program provided a low-cost way to get people out into local churches with a message from the national setting. While the resources may not exist today to convene ambassadors in person once a year, it maybe possible to either gather biennially around General Synod or provide a pay-to-attend annual gathering for these volunteers.

Kent Siladi and Charlie Kuchenbrod of the Southern New England Conference (nee Connecticut Conference) organize staff visits to congregations. They prepare by reviewing the 11-year report of the congregation and its annual report. They gather additional information by learning from staff colleagues how the congregation interacts with the conference (youth to camp, MIDs, leaders at events, assistance with search and call, etc.). During the visit, Kent and Charlie talk about the relationship between the congregation and the conference.

Either by volunteers or staff, visits can strengthen relationships, especially if we listen more than talk. I like to ask three questions in a visit to pastors or congregational leaders:

- How does the conference (or national setting) strengthen your ministry?
- What do you wish the conference (or national setting) did better?
- How could you see yourself helping to make that happen?

By whatever method, it remains true: successful fundraising can't happen without showing up.

National Staff Trips:

The congregation I served as a local pastor frequently hosted national staff, on average, once a year. Yet in over twenty years of ministry, only one guest made a financial request of my congregation (Ron Bufford for the Still Speaking Campaign).

Conferences and the national setting would do well to think through how to leverage national staff trips as a fundraising moment. Visits by national staff present conferences with a philanthropic opportunity:

- Conference leaders could invite key donors to a special event or meal with a national staff visiting the conference, especially so when our officers travel.
- Conferences could host a fundraising event centered around a mutual ministry; for example, a national staffer speaking in a local church about climate change might also speak at a fundraising event whose proceeds support the climate initiatives of the conference and national setting.
- The visit provides a helpful “impact” story of OCWM Basic Support.

BUT for this to be able to happen, national staff must clearly and *in advance* inform conference leaders of their travel plans. Numerous stakeholders spoke of the deep frustration when this communication doesn't happen. National staff working with a congregation without having notified conference leadership undercut every statement about cooperation and collegiality.



The national setting might want to develop an accountability system around travel communication. The importance of measuring and improving this metric would need to come from the top. It might include adding "timely coordination with conferences" to staff performance evaluations to communicate its seriousness. And it might be meaningful to post in Cleveland the "conference communication grade" for each team just as restaurants post health inspection reports.

National staff visits to do work in conferences provide a potential area for improvement; done right, we can strengthen OCWM Basic Support.

Sides:

Good things to try alongside more focused initiatives

Congregational Leadership Changes:

As it happened, “a new Pharaoh arose who did not know Joseph.” Congregational leadership changes in our largest giving congregations present a moment of vulnerability to OCWM Basic Support. We know the scenario. A long serving senior pastor maintain a depth of commitment to OCWM Basic Support. After a transition, the new senior pastor arrives with a different agenda or understanding of OCWM Basic Support.

The commitment drops, often significantly. We could learn together best practices for attending to this transition.

Database:

Conferences and the national setting use a variety of databases. It's worth considering the potential for sharing the national database with conferences so that we operate out of the same data-set. We need to think through the handling of donor data and training in the use of it in a shared system. Alternatively, conferences might consider coordinating among themselves to use the same product so that mutual support becomes possible. Here are affordable options for customer relations management (CRM):

- Onpage – While not a financial suite, this CRM provides a cost-effective way to track the “moves management” (connections, conversations, touchpoints, etc.) of relational ministry, including fundraising. It could Onpage can be used with Quickbooks.
- Blackbaud NXT – While Blackbaud NXT remains price prohibitive as a stand-alone product, conferences could partner with one another or with a community foundation to have a database at an affordable cost. The UCC Foundation of Wisconsin works with the Community Foundation of the Upper Peninsula. CFUP provides the back-office accounting (fund accounting, preparing thank you notes, cutting checks, and reconciling statements) and Blackbaud NXT. The foundation pays about \$800/month for these services from CFUP.

CARD could significantly help conferences and the national setting by gathering the names and contact information of lay leaders in congregations and boards of directors for conferences. Data on leaders beyond pastors would be very beneficial for communications and appeals.

Expand Donor Options:

The national setting or conferences could assist congregations by producing easy to use infographics such as promotions of wills and bequests, charitable gift annuities, and IRA charitable rollovers. While these would not directly affect OCWM Basic Support, they would be of practical help to congregations. Infographics need to be easily adaptable with the congregation's logo and able to be dropped into the congregation's print and media resources.

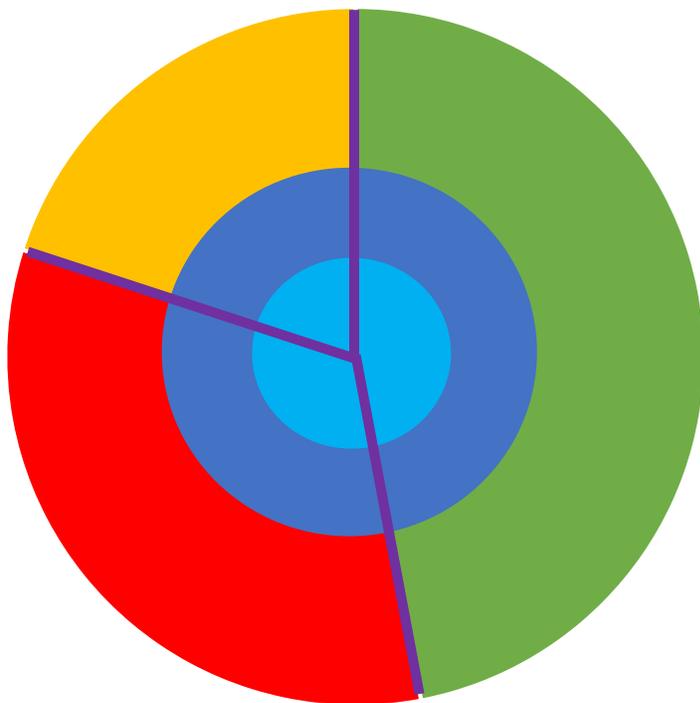
Many (smaller) congregations struggle with processes to receive stock donations and even online gifts. Conferences or the national setting could look at options to accept donations on behalf of local congregations; this could be integrated into UCC Everywhere.

New Infographic for Budgets:

The national setting and conferences could move to “narrative budgets 2.0” by creating infographics that align the budget to mission priorities and fold “administrative” expenses into program costs. Curtis Klotz described this way to organize and explain budgets (and overhead) in a recent [Nonprofit Quarterly](#) piece.⁴ At its best, we would present the budgets of both the national setting and the conference together in one mission-aligned infographic, such as the graphic below of the Montana – Northern Wyoming Conference Budget.

⁴ Klotz, Curtis, “A Graphic Re-Visioning Of Nonprofit Overhead,” [Nonprofit Quarterly](#), August 16, 2019. Available online [here](#).

Montana N. Wyoming Conference



Desserts:

Ideas beyond OCWM Basic Support (we don't want the request for OCWM Basic Support to be the only way we ask for operational support)

Friends of the Conference & National Annual Appeal:

Many conferences have a “friend of the conference” appeal similar to the “annual fund” of the national setting. Yet these appeals underperform when measured against the size of the conference or the amount raised OCWM Basic Support dollars.

It would be interesting to develop a campaign jointly between a conference and the national setting for the support of operations, a special project, or planned giving. The joint campaign would leverage the separate individual lists of each setting for mutual benefit. A conference the national setting could likely make a more compelling case together than each could separately. Conferences without a Friends of the Conference campaign might particularly benefit.

How Much Do Donors to Conference and National Overlap?

A quick study of 754 donors to the Wisconsin Conf and the National Setting since 2017 found:

- 37% gave only to Wisconsin
- 13% gave to both
- 50% gave only to the National Setting

in

and

Capital Campaigns:

Capital campaigns not only raise money for a specific project but often become an important moment of educating church members about the practice of generosity. Often the effects can be felt long after the

campaign ends. The national setting continues to receive planned gifts first decided up in the “Make a Difference” campaign in the 1990’s; a conference leader credited a campaign a decade earlier in shaping their approach to philanthropy. How could conferences and the national setting be more systematic in approaching capital campaigns? How could this happen in a more coordinated and mutual way?

Giving Circles:

In 1806 a group of students took shelter from a rainstorm in a haystack; this prayer circle would go on to form the American Board of Commissioners for Foreign Missions (now Global Ministries). American history abounds with examples of friends gathering together to form a circle of support for a new project.

Especially in marginalized groups, philanthropic giving circles provide a potential source of support for programs and initiatives. (See: [The Sweetness of Circles](#), [New Look at Giving Circles As Entry Points for New Donors](#), [Giving Circles' Unique Role in Philanthropy to Marginalized Communities](#)).

Impact 100, a national women's philanthropic movement, illustrates how giving circles work. Women create a local group of donors, each gives \$1000, and collectively the group awards the funds to a charity of their choice.

Imagine UCC giving circles modeled on Impact 100: a group of 100 individuals gathered at the association level, each giving \$1000, and deciding together on how to make a more just world. Perhaps these circles could be challenged to offer three grants of differing amounts to ideas they wanted to fund in the national setting, the conference, a local congregation, or an agency related to the UCC.

Peer-to-Peer:

Peer-to-Peer fundraising could also provide an exciting new option. Imagine if we had a platform for a UCC leader to cast out a vision and invite friends to support it financially. Peer-to-peer appeals could raise funds for the local congregation looking to expand its food pantry, the conference looking to add a specially-themed camping experience, or the national setting wanting to test support for a new idea (check out the UUA version, www.faithify.org). One model for this might be donorchoose.org, which gives teachers a way to pitch an idea to a broad network of donors. Peer-to-peer fundraising offers a way to connect to new and younger donors and one that empowers and equips them to raise money. Blackbaud's Just Giving platform might be worth a conference or national setting experiment to see how this giving option would work for our constituents.

Congregational Grants:

Many congregations – 58% of mainline ones – have some endowment. While much of these funds support the on-going operation of the local congregation, a significant number of dollars go to mission projects beyond the local congregation.

A conference or the national setting might look to create a uniform grant application for congregations to use and even a central clearing house for those applications. Congregations would get a broad range of ideas and options to fund with their endowment dollars. A uniform application could be a way to highlight UCC-related agencies within congregations. It might also be a way to pitch ideas from the conference or the national setting.

Even without a joint grant application, conferences could look at ways to spin-off operational projects into grant opportunities for a local congregation. For instance, a local congregation might make a grant to fund the immigration initiative of the conference as an above-and-beyond OCWM Basic Support gift.