



The Stewardship for Us Team

Next Steps Process Preparation Materials

The following information is requested to facilitate preparation and planning for your Next Steps Process. Whenever possible, information should be provided electronically, and financial data provided in a spreadsheet format. Note: Please set up a Google Drive or Dropbox folder for this purpose (or ask the consultant to do so!) and share, with full permissions, with the consultant.

Links to information on the congregation website are acceptable, including via access to member-only sections of the site. If information exists only in hard copy, please scan it and add it to the electronic files. If hard-copy sample documents are requested, please send them to the address below.

All information is kept in the strictest confidence.

1. Annual report for the current and prior year, including financial statements and operating budget. Also provide the most recent financial report available that shows income and expenses, budgeted vs. actual.
2. Brief history of the congregation.
3. Status of or progress toward Welcoming Congregation recognition.
4. Status of or progress toward Green Sanctuary accreditation.
5. Information on any recent or ongoing efforts to address anti-racism, anti-oppression, and multiculturalism.
6. Information about accessibility (in the building and grounds, by phone, or web, etc.) for any different abilities that you consider.
7. Information on governance including by-laws and a summary of the congregation's governance structure noting the roles and composition of the Board or other governing body, executive team, and professional and administrative staff. Also provide key policies and end statements if operating under policy governance.
8. Any demographic information you have about the congregation, present, past, or comparing past and present. This might include age, gender identification, ethnicity or cultural background, duration of membership, etc.
9. A spreadsheet showing annual financial commitments (pledges) for the current and prior year, including names and total dollar amount. **Please be assured that the names and individual pledge amounts will remain confidential and will not be shared with anyone.**



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10. Information about the most recent annual budget drive, including the brochure and format for the drive. If available, the same for the preceding two years.
11. Financial and management data on the Endowment Fund and any other restricted or unrestricted long-term investment funds, along with policy documents that govern the acceptance and use of the funds.
12. Information about outstanding loans, indicating initial and current balance, terms, purpose, and lender.
13. List of information technology (IT) systems you use to support stewardship, membership, and financial management; include church management software, accounting, member engagement, pledge tracking, electronic pledging and giving, communication, etc. Indicate any planned changes and anticipate timeframes.
14. Indication of whether the congregation provides fair compensation to staff based on UUA guidelines. Also the current year and past fulfillment of the request through the Unitarian Universalist Association for the Annual Program Fund.
15. Membership figures, worship service attendance, and children's religious education attendance for the last three years.
16. Any available information about the most recent capital campaign, including dates, purpose of the campaign, amount raised, members of the campaign committee, and key materials such as a brochure or case statement.
17. Current mission statement, strategic plan, and/or long-range financial plan, or confirmation that they do not exist.
18. Any notes, results, outstanding issues, or conclusions that can be shared from any recent Special Congregational Meeting.
19. Copies of the charters and job descriptions (or notice that they do not exist) for the Governing Body, Strategic Planning Group, the Stewardship Committee, and the Endowment Fund.
20. Any additional information that you think might be helpful. If any of this information is on your web site, confirm these are the current versions.

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