

Minutes approved 1/17/2018

WUS Stewardship and Finance Committee Meeting 12-18-2017

In attendance: Dave Kronberg, Steve Milt, Judy Murray, Sue Kiewra, Steve Butterfield, Rev. Laura Randall (guest from UUA Stewardship and Development)

Absent: Rev. Heather Janules, Don Landing

Notes filed by Judy Murray

In lieu of a planned agenda, Dave Kronberg developed the following topics to discuss with our guest Rev. Laura Randall:

- We would like to know what others consider when naming their legacy circle. How do we manage its perception so it is viewed as unequivocally positive and not divisive?
- What are some basic methods of approaching potential members and the environment of their greatest comfort (home, church, restaurant, ...)?
- Are their existing 'marketing' templates available?
- Can the UUA gift planning office provide us information about national UU planned giving trends and other data? What are the most successful planned giving strategies and most popular instruments?
- What do you see as the most compelling "value propositions" that address current and future challenges to congregations?
- In addition, which specific PG instruments and their average range of gift amounts have been the most popular?
- You mentioned that a Maine-based UUA staffer, Jay Pacetti (sp?) may be available in the future to assist us. Could you tell us a little about him and what approaches he employs when addressing congregations?

Notes on what Rev. Laura said, in no particular order:

- Keep name of legacy circle neutral (that is, don't name it after actual persons), but it's important to tell stories of individuals in the circle
- Consider having a Legacy Circle Sunday each year with testimonials from circle members
- Some technical tips on implementation of the Circle:
  - develop a financial mission statement for the congregation
  - host WISDOM PATHS, an adult RE course (18 sessions found on uua.org)
  - tap affluent, sophisticated people already doing estate planning
  - put a checkbox on every publication WUS sends out asking if you've included WUS in your estate plans
  - incorporate planned giving into every RE program offered
  - hold a Death Cafe (google this) for four consecutive weeks after Sunday services to discuss wills, distributing/gifting your assets, etc.
  - engage professional advisors to minimize congregational liability
  - explore uualegacy.org with its 24-page planned giving guide, calculator and brochures
  - plan a legacy event, like a trip to a museum, etc.
  - consider 1-to-1 conversations with potential legacy circle members
  - Mark Ewert is a consultant for hire that WUS might consider to train us on tactics for inviting people to the circle
- Congregations doing similar work:
  - Sherborn hosted a Death Cafe last spring; Rev. Laura said she could share their materials with us
  - look at websites for congregations in San Diego, Ashville NC, Unity in Minneapolis/St. Paul, and closer to home Arlington, Needham, Cambridge
  - look up Newburyport's "destitute gentle women" fund