

First Parish Financial Committee Meeting Minutes - Feb 7, 2017 at 7:30am

Patty Popov, Fifi Ball, Tom Wilson, Gib Metcalf, Fred Van Deusen and Rudi Scheiber-Kurtz

Launching of the Legacy Giving Program

This project went from conversation to reality within 6 months and on Sunday Feb 12, 2017 the Legacy Giving Program Committee, Tom Wilson, Patty Popov, Fred Van Deusen, Philip vanderWilden and Laura Bernstein will present the program at a Forum to the congregation.

Legacy Giving information will be available on the FP website, in a guide, and in a brochure. The program will encourage congregants to make planned gifts with clear instructions on what to do, with First Parish in Concord being the recipient. The UUA will administer the charitable gift annuities option.

Congregational wide Stewardship Survey

The subcommittee of Tom, Gib and Rudi, with the feedback and support from key constituents created a congregational wide survey. During today's meeting, the FinCom committee discussed in detail each of the 21 questions before it goes to the Standing Committee for approval. Rev. Howard Dana will be sending the survey.

The stewardship survey focuses on four primary areas:

1. Efficiency
2. Effectiveness
3. Relationship building
4. Stability

Unlike previous surveys, this one includes questions around commitment and feelings for the church. The mailing is anticipated to take place after the Standing Committee's vote on Feb 12.

To measure efficiency of the pledge drive process it was recommended that we look at Total hours and total number of days spent on the pledge drive; to measure effectiveness, we could measure dollars per pledge; to measure relationship building we could use information from the survey results. By tracking these measures we can see how the process is performing over time.

Meeting was adjourned at 9:45am