



**Unitarian Universalist Association of Congregations**  
*The Congregational Stewardship Network*

**Next Steps Visit Report**  
**Unitarian Universalist Church of Las Cruces NM**

**I. Summary of the Next Steps Visit**

The Unitarian Universalist Church of Las Cruces, NM (UUCLC) engaged UUA Congregational Stewardship Consultant Bill Clontz to conduct a Next Steps Visit and to prepare this report. The visit focused on the congregation in all areas, with emphasis on stewardship and on considerations for potential capital improvements. This report contains observations in areas of strength, challenges, recommendations, and supporting material. Bill met with over 80 leaders, staff, and members in a series of 12 meetings. Bill attended Sunday services and the Roundtable and provided an initial verbal report of the visit to the leadership. The visit schedule is at Appendix A.

**II. Background Data**

Name and Mailing Address of Congregation	Unitarian Universalist Church of Las Cruces, 2000 S. Solano Drive Las Cruces, NM 88001
District/Region	Mtn. Desert Dist./ Pacific Western Region
Website Address	<a href="http://www.uuchurchlc.org">http://www.uuchurchlc.org</a>
Minister	Rev. Sue Redfern-Campbell
<i>Key Leaders/Staff (a partial list)</i> Julie Woody-BOT President Haney Pearson-Sunday Svcs, Building Feasibility Patrick Igo-Fellowship and Hospitality Renée Beltran-Communications & Outreach, RE Shirley Davis-Finance Carol Winkler-Treasurer Lyn Pearson- Membership, Communications David Carlson-Endowment, Finance Jan Thompson-Leadership Development Micah Pearson-Communications, RE	<i>Staff:</i> Catherine Massey, Director of Music Susan Freudenthal, DRE Marion Gonzalez, Office Manager Carlos Reyes, Sexton
Visit Point of Contact	Julie Woody, BOT President
Membership/ Commitment Units	194/ 117
Annual Financial Commitments, 2012-13	\$216,000
Average Household Financial Commitment	\$1,884
Median Household Commitment	\$1,200
Current Operating Budget	\$256,890
Endowment	\$68,000
Endowment Funds in Operating Budget?	Yes/\$2,000 (RE). Endowment is in 4 parts.
Operating Reserves	Yes. Small contingency funds.
Mortgage?	On rental property- \$30,000.
Last Budget Drive Approach; % of goal attained	Letters/ Commitment Sunday - 90%
Most Recent Capital Campaign	1977
RE Enrollment	32
Fair Share Congregation?	Yes
Consultants in the Past Three Years	Nancy Bowen, 2013. Larry Wheeler, 2005.



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### **Objective of the Next Steps Visit**

The visit addressed all program areas, focusing on the overall health and operations of the congregation. Particular emphasis was placed on the financial and organizational readiness of the congregation to support a prospective capital project and the overall health of the congregation after a challenging transition year.

Prior to the on-site visit, Bill reviewed substantial amounts of material provided by the congregation over the last three months, including information on finances, membership, programs, staffing, bylaws, church history, community engagement, outreach, recent annual reports, newsletters, weekly e bulletins, and the church web site.

Bill also had telephone conversations and email exchanges in advance of the visit with the board president (the visit point of contact) and Vice President, as well as phone and email exchanges with the minister and others.

### **Anticipated Projects and Steps Taken to Prepare**

The congregation supported a major building program about a decade ago, referred to as Phase I. For a variety of reasons, Phase II was continually delayed and became a deferred project for the indefinite future. Efforts are now underway to proceed with Phase II, including catching up on deferred maintenance, enhancements and expansion of the current buildings (such as additional Sanctuary space and improved accessibility), and landscaping. Definitive costing for any options has not yet been undertaken.

Some preliminary discussions with architects for design and program development ideas are under way through an Expression of Interest process. The likely elimination of the rental units on the property is under consideration, probably through demolition, but perhaps through sale or conversion of use. The rental units have been problematic for maintenance and management, provide little revenue, and still carry a mortgage.

### **Steps Taken to Prepare for Possible Capital Improvements**

A rather long and extensive appreciative inquiry based approach was conducted some years ago to engage the congregation in capital program considerations. More recently, evaluations have been and are being conducted on the state of current facilities and feasibility of proceeding with new construction.

A long-range plan exists, and is quite thorough in its treatment of building and facilities issues. It is somewhat dated now and has not had a rigorous review and update. It generally does not address larger aspects of congregational life outside the capital improvements issues. The capital project now awaits further decisions as to whether it will go forward at this time and if so, with what priorities.

Congregational engagement to this point in the restart process has been intensive for some, focused appropriately at this point more on concepts, requirements, and preferences, rather than timelines, making choices, and financing. Although the



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leadership has worked to inform and engage the entire congregation in this process, it's likely that understanding and involvement in the process by the majority of the congregation is uneven at this point. As the process continues, more people will focus on the issues and opportunities before them. As is discussed later in this report, the time to begin making some choices and moving on with the process has come.

General options under consideration are:

- A. Do nothing major at this time.
- B. Carry out limited plans (catch-up maintenance, the Sanctuary, and accessibility).
- C. Complete planning and execute a full Phase II plan over time in stages.
- D. Carry out a full-scale plan now.

### **III. Overview of Findings**

There is no shortage of talent at UUCLC. The congregation is fortunate to have a mix of experience and a number of new members who can bring fresh perspectives and ideas. Following a very difficult year of unanticipated transition, a lot of things are going well at UUCLC. Members are eager to build their community and to serve the larger area in and around Las Cruces. UUCLC is unique in the area and has much to offer. The staff, led by the developmental minister, is working closely as a team. Although my time with UUCLC did not allow me to establish a good read on how the Council is functioning, my impression is that this is an organization working to fulfill its role. The Board has a very solid atmosphere of teamwork and intends to continue developing a close working relationship with the minister and the staff. All this provides a strong foundation for UUCL to draw upon as decisions are made in the coming months.

Experiences like the past year could have broken the leadership and divided the congregation. Instead, the congregation largely came together, even when everyone did not always fully agree with each other or understand all that transpired. UUCLC chose to mature as a congregation and to move forward. The leadership and the membership deserve credit for bringing the congregation to where it is today. There is much to be proud of everywhere you look.

There are some decisions that need to be made, and some conversations to be held among the congregation to build for the future. There are some institutional and procedural challenges to be met, as described in this report, but there are far more opportunities than problems on the horizon. Addressing the challenges effectively and aggressively will put the congregation in a stronger position for the future decisions that will be made. There is no reason why UUCLC cannot accomplish the goals it sets as long as it sets those goals with due diligence and thoughtfulness. The opportunities are certainly there.

This report recommends that some time and effort be invested in bringing a number of processes and programs on to a healthy footing, especially improving the stewardship culture as building blocks for a major capital campaign such as is being considered. These improvements will underwrite future major efforts and will provide the congregation assurance that the institution is working well and that what may be



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undertaken in capital improvements can be carried out with excellent processes and with confidence in the outcome. A healthy mix of practical judgments and bold dreaming beyond today will make possible the realization of UUCLC's aspirations.

A Next Steps Visit is a highly concentrated event. It depends upon the timely sharing of a very large amount of information over several weeks and a well-coordinated visit on site. Special thanks go to visit coordinator Julie Woody for bringing this all together. Her thorough preparations for this visit made it productive and pleasant for all concerned.

A number of other people contributed significantly to preparing for this visit, especially in locating and sharing background information. My thanks to Marion Gonzalez, Lyn Pearson, Shirley Davis, and Carol Winkler for their support in this regard.

The fact that many people gave so much of their time, especially on a weekday evening and over a busy weekend, is gratefully noted. Many people attended multiple meetings, including some out of their areas of concentration at UUCLC but in which they are interested and want to contribute. This speaks well of the sense of community at UUCLC and to a culture of service among leaders and volunteers. I was struck by how many people were fulfilling necessary roles not because they were recruited but because they saw the need and stepped up.

#### **IV. Commendations and Strengths**

**1. UUCLC Came Through an Exceptionally Tough Transition in Good Shape:** An unanticipated and sudden leadership transition such as UUCLC experienced last year is by definition a traumatic event, with multiple repercussions. While it is inevitable that there will be residual issues, questions about process and decisions, and a sense of loss, UUCLC has landed on its feet in all the important ways. This is a tribute to the congregation, to the leadership, and to the support you received from your District. While events like this always leave scar tissue, some congregations are damaged by it, while others manage to grow and learn from it. UUCLC is clearly in the latter category and deserves to recognize that good news.

**2. Choosing a Developmental Ministry Model was Exactly the Right Decision:** Calling an Interim Minister upon the departure of your settled minister would likely have led to a period of feeling unfinished and unsettled within the congregation. Calling another settled minister would have been too much to try for, too soon, given the circumstances. The decision to go forward with a developmental ministry provided the right balance of stability and transition. While the congregation will need to make some decisions shortly about the timing of calling a minister, you have a partner in your developmental minister and enough time to settle down, reflect on the course you wish to take, and proceed in a manner that is best for the long term health of UUCLC.

**3. The Board functions as a team, with Collaboration and Mutual Support:** Having a board consisting of well-qualified and motivated individuals who work well together as



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a team is a highly important asset for any congregation wishing to heal, to grow, and to develop. UUCLC is fortunate to have such a board, one I believe actually made stronger by the challenges it dealt with in the recent past. I have encouraged the board to take care in work distribution so as to avoid leader burn out and to use small group task teams to frame issues and recommend solutions whenever possible, rather than operating as a Committee of the Whole. Overall, a very good team is serving UUCLC well; they feel trusted by the membership (always a work in progress in any congregation) and appear to work well with the minister, the staff, and the council.

#### **4. The Church has Ample Room to Grow and Change; the Location is Excellent:**

The church property has ample space to expand in almost any direction and although yet to be determined, may expect to encounter few zoning or permitting issues should expansion and enhancement be proposed. Additionally, UUCLC has an enviable position on a highly travelled road that connects directly to the University and other desirable areas. While the site has some challenges (the rental units, appearances from the road, etc.), I have seldom encountered a situation wherein a congregation was fortunate enough to have so much room to grow or change and so much desirable highway exposure.

#### **5. Initial Restart Steps for Phase II Have Been the Right Ones, and Well Executed:**

After a long hiatus, Phase II of the capital improvements project has restarted with fundamental steps to determine what might be possible and whether appropriate firms might be interested in responding to UUCLC priorities. The request for Expressions of Interest was well done, and the follow on process of review now being conducted is progressing with good process. The challenge now will be to move to the next steps: ascertaining what the priorities actually are (and why) and determining what may be done that is affordable and supportive of the mission and programs of UUCLC.

#### **6. Good Identification and Analysis of Challenges:** I found a number of areas of concern wherein the responsible leaders and volunteers had already identified these same concerns and in some cases are already at work implementing needed changes. The communications team is one such example. As noted in the next section of this report, communications have not always performed as desired. I found the communications team well aware of general and specific issues and well on the way towards making the necessary changes and upgrades to deliver results. Although the results of such effort may not be in evidence immediately, they will come sooner rather than later, with benefits for the entire congregation. A bias toward critical observation and a willingness to look for better solutions were often in evidence at UUCLC. This will serve the coming decisions and program improvements admirably.

#### **7. Community Engagement and Interfaith Cooperation:** This congregation has worked diligently and consistently over many years to engage and serve the local community on a long list of social and economic justice issues, in community support, and in the arts. All indications are that those who work in these areas locally know and



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respect this congregation. It is less evident the broader community is as aware of the contributions and the values of UUCLC, something the social justice team, congregational leadership, and communications team will want to take as a challenge: tell the UUCLC story more often and more effectively, on a wider front.

- 8. Realistic Prospects for Modest Growth:** UUCLC experienced impressive growth some years ago but has been essentially flat for a decade. While many new and valuable members have joined during this period, about the same number have departed for one reason or another (there is no trend of dissatisfaction in evidence, just normal moves, deaths, etc.). This, plus your location and the lack of other offerings in the area that match what UUCLC provides in terms of spiritual and intellectual reward, indicates a reasonable potential for growth, given a well developed growth plan. The UUA provides a wealth of examples and sample programs that should be considered to support your planning.
- 9. Integration of the Arts:** The presence UUCLC has established in the regional arts community is unique and substantial, led by the Tombaugh Gallery. The congregation has wisely nurtured and encouraged this connection, enriching congregational life and important outreach to the wider community in unique ways.
- 10. Overall Financials are Workable:** Although there are concerns with the stewardship climate, with gifts distribution, and with the endowment (all noted in the next section of this report), the overall financial profile of UUCLC is reasonably healthy and can be built upon. The congregation has no debt beyond a small mortgage on rental property (and likely has room to assume modest debt should this be desired at a later point), pledge income is generally adequate to cover operating expenses, and the finance committee structure works as a financial clearing house, with good connectivity to stewardship, the endowment, and congregational leadership.

#### **IV. Observations and Areas of Challenge**

Much of the future success of UUCLC, including a possible capital campaign, will depend on how well the leadership and the congregation build on the successes and strengths noted earlier in this report, and how well challenges and shortfalls are addressed. Nothing discussed below in this report, nor any of the recommendations in the subsequent report section, is exceptionally difficult, but they do require some focus and commitment, and to a degree, some culture change that will underwrite progress in many for years to come.

The Next Steps Visit provides an opportunity for the congregation to add to its own self-review and to clarify its priorities. Simply applying some of the recommendations made in this report are unlikely to have substantial impact. Taking this opportunity to think through policy, process, procedure, and congregational polity will have that impact. Much of this is fundamental to the life of the congregation.



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- 1. The Stewardship Culture Lacks a Full Measure of Integration, Commitment, and Open Discussion:** Much of this conclusion is evidenced by the gift distribution patterns discussed in the next finding, but the issue is broader and deeper than simply the numbers. Many in the congregation, including some leaders, are not comfortable talking about giving or about money in the context of church life. There is not a program in place to mentor those who might serve in stewardship, finance, the endowment, or to be strong in these areas as part of the board or the council.

It is highly likely that many who do not feel like they can contribute as much as they might wish financially feel they cannot discuss church finances as full members. We have no such hesitation in talking about our volunteer time and talent commitments. Stewardship is an area of congregational life that thrives on candid and supportive conversation, yet no training has been offered in memory to enable members to do this as visiting stewards. Separating stewardship from the rest of congregational life, making it simply about paying the bills and meeting our obligations, inevitably undercuts sustainment of the overall ministry.

The amount of income that comes from contributions of record rather than from pledges is surely received gratefully, but the amount that comes in this form is somewhat high for a congregation of your size. This, and a somewhat higher than should be expected rate of pledges not being honored in a given year, are indicators that the time is ripe to bring stewardship forward as a positive, integrated theme of congregational conversation and education throughout the year.

- 2. The Distribution of Annual Commitments is Not Healthy:** A graphic depiction of UUCLC's annual giving (pledge) distribution, compared with a healthier and sustainable giving pattern, is at Annex B. The concerns are evident:
  - The number of households contributing the first 25% of pledged income is about half the number of households desired for healthy distribution. This places a very large burden on comparatively few households and puts the congregation at financial risk.
  - Approximately half of the total amount pledged annually comes from only 23 of 121 households. This raises still further the same concerns noted above.
  - Over 60% of the members contribute less than 25% of the total pledged amount. Not every one can give at high levels, of course; a normal distribution pattern has much of a congregation in the fourth quartile – providing only 25% of total gifts. However, UUCLC's pattern goes well beyond, with this group being too large by half for a healthy, sustainable condition. This likely indicates that many members do not fully understand or accept the importance of a sustained financial commitment – at whatever level is manageable – as a



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core element of their membership.

- As was noted earlier, the number of households choosing to make a contribution of record rather than a pledge and the rate of noncompletion of annual pledges also indicate challenges in this area.

The distribution of gifts pattern surely does not indicate a lack of generosity and community. It more likely reflects the absence of a sustained, integrated conversation about the role of stewardship in the life of the congregation and how it relates to every member and friend. UUCLC's own bylaws clearly recognize this, but it is not being translated into daily congregational life. This calls for congregational conversations about being in community, living UU values, and supporting the ministry in every way as best each member can, including financially.

Emphasis on the Fair Share Guide is helpful for taking into account individual capacities to contribute. Publishing gift distribution ladders and program budgets rather than just line item budgets also enable members to understand the issues and to see their role as stewards. But these are only tools. What could make a difference is the willingness of lay and professional leaders to take this on as a core ministry in which they lead by example and for which they are prepared to speak with members honestly, in candor, and in community.

- 3. The Endowment Fund is Too Small and Not Visible:** The endowment is very small for a congregation of this size and age demographic. This is a cornerstone element of UUCLC's future and provides an important opportunity for members to make a valuable long-term contribution. The Fund itself and a component that could be referred to as a Legacy Circle are not as visible as they should be, nor is recognition of those who participate in the Circle. Goals for contributions are modest. The number of households already participating is quite good, indicating the interest is there and ready for encouragement.

These areas are easily addressed and should be worked without delay, to include establishing goals. Recent decisions to move management of the fund to the UUA are a good start, freeing the committee to focus on growth and education, as noted in the Recommendations section below. The committee needs to raise the visibility of the endowment, make it easy for members to learn about it and to contribute, and ensure the membership knows what an endowment provides (future security, funds to invest in major projects, income that could support the budget, collateral for loans, etc.).

- 4. Special Funding is Generous but Problematic:** The congregation is fortunate to have more than a few members who care very much about the congregations' needs and have stepped up to provide the financial resources to meet requirements. The risk is that such funding becomes the norm for meeting requirements and those who lack the means to participate in this way can feel that the democratic process is being





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circumvented so that only favored projects, rather than generally agreed upon priorities, are being funded. Those unable to participate feel left out; those who generously give can feel persecuted for doing a good thing. This can be managed to allow both generosity and participation, as noted in the Recommendations of this report.

- 5. Separation into Subgroups is a Worrisome Trend:** In almost every meeting I held over the weekend, the topic of separate groups within the larger congregation was mentioned, by those in such groups and by those in the congregation at large. It's not unusual for groups within a congregation to develop strong ties and a sense of identity, but it is important for all concerned to maintain the sense of the larger community that makes all these other elements possible. This is not an issue that should be overblown, but one that may benefit from discussion within the congregation, not separately by subgroup. At some point, taking advantage of facilitated discussion supported by District might be helpful.

During the visit I heard concerns about the potential for a divide concerning the Gallery, the RE Community, and CUUPS; there may be other such concerns as well, given the frequency this issue was raised. And yet – the congregation makes the Gallery possible and the Gallery enriches the congregation. RE represents your future, and many adults look forward to a quite, contemplative period during the Sunday service. CUUPS brings a rich and long earth centered tradition and the CUUPS national charter calls for commitment both to CUUPS and the UU Principles.

In short, all these components need each other and need a mindset of living and working together as a part of UUCLC. I was struck that so many felt concerns in this area, but no one was looking to harden divisions or detract from what various parts of the congregation contribute. Quite the opposite; there is energy to strengthen the wider UUCLC sense of community.

- 6. Internal Communications are Uneven:** The weekend highlighted the need for increased emphasis on internal communications among members and leaders. Some communications gaps are not unusual in times of transition, but minimizing them should be a priority for those seeking to make changes.

Three imperatives are most important (1) No surprises – stakeholders (defined broadly) should be fully included in planning, goals and timelines. They need not agree with changes underway, but as members of the congregation who have toiled in these fields, they should not be overlooked, especially in communications. (2) Ensure processes and decisions are consistent with the church's bylaws and procedural guidelines, so that good process is honored and communicated. Everyone involved in these conversations over the weekend recognized the good intentions of all involved and pledged to stay in covenant with each other. (3) Understand that good communication is push, not pull, oriented and that information must be communicated frequently by multiple means or someone will miss it. And members



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have to be curious enough and interested enough to ask questions and not wait for everything to be handed to them. We're all in this together should be the watch word. The communications team is aware of the challenges and is working to serve the congregation as effectively as possible.

On an external communications note, UUCLC has a lot of good stories to tell. I have encouraged the communications team to work with stakeholder groups to get well written and illustrated stories into local media regularly and before hosted events happen, and have encouraged the Gallery team to consider pursuing an article in the UU World about the unique facility and capability the church has made possible.

7. **Clarity on What is Needed, and Why:** For many people who were present for Phase I of the capital improvements program, what is needed for Phase II is clear and the time for action is long over due. For more recent arrivals, the background and the information may not be so clear. A significant amount of time has passed since Phase I was conducted. It is important as the congregation moves forward in its decision making process that it not be taken for granted that everyone is at the same place. The process should clearly ask at regular intervals: What are we pursuing? What purpose does our decision serve? Have we had good process that lets us go forward together?
8. **The University Connection is Not as Strong as It Should Be:** The congregation has invested substantial time and energy in the University campus. That effort appears to have stalled out over the last couple of years. While it is understandable to be discouraged that the constant turnover of students means the prospects for developing members is low among that population, one would hope that the congregation would renew its efforts.

To the degree that students are touched by UUCLC, the congregation plants a much-needed seed elsewhere for Unitarian Universalism as students move on. UUCLC is able by its proximity to provide this gift; it's a mission worthy of the congregation. I would also encourage a renewed effort to develop members among the university faculty, beyond those valued retired faculty that are now members of UUCLC. The active faculty should be a natural constituency for UUCLC and contributors to outreach.

9. **Bylaws:** As we discussed during the visit, the congregation's bylaws are a mix of very good language and a lack of clarity or conflicting sections. On the one hand, I made special note of some of your wording as excellent examples to share with other congregations. On the other hand, as I looked at the sections concerning open meetings, the multiplicity of names for the congregation, reference to the now former address of the UUA in Boston, establishment of a (standing) stewardship committee, there was room for improvement and clarity.

Two additional items seem worthy of review: the blanket disallowing of proxy and absentee ballots is one. The other is what constitutes a quorum and a majority vote.



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While the formulations for the later are not unusual, be aware that as formulated only 10% of the voting membership could pass any action desired at a meeting (a quorum being 20% and a vote being carried by a majority of those present at the meeting). A careful review by a small group would be useful.

- 10. Mission and Vision are Not Active:** The congregation went through a mission and vision process not long ago, one that I was informed by a number of people was quite long. While there is an alternative approach to developing a good mission and vision statement (see recommendations section of this report), the products that were developed are good, if a bit long. Unfortunately, at no time was I able to find a participant who knew what these statements were or how they actually related to congregational life. Some knew where to look them up.

This is not a small matter. The congregation is considering a number of changes and possibly a major capital improvements program. A set of vital mission and vision statements should be the first guidepost against which commitments of time, energy, and resources are measured. If the congregation and the leadership are not clear about why this community exists, what is important, and where you wish to go, its difficult to find your way and make the right choices.

- 11. Curb Appeal is Lacking:** As noted earlier, UUCLC is ideally situated along a major thoroughfare. The potential to catch the eye with pleasing aesthetics and informative signage is significant, but untapped. The Aesthetics Committee is aware of this and is working to develop an affordable presentation of the property that will take advantage of the location. There is no need to await further property development decisions to move on this area. People driving by UUCLC should feel pulled to look at the site and when doing so, should see signage that says something special and welcoming is going on here that should be investigated.

- 12. A Growth Plan is Missing:** The potential for growth is there for UUCLC, in spite of stagnate numbers in recent years. There is a regular flow of visitors and your greeter teams are terrific. Now would be a good time to focus on the next step, helping the visitor become a repeat visitor and the repeat visitor become a member. This requires an intentional and detailed approach to accomplish. There are a host of good materials available from the UUA to help accomplish this. I will provide some links and references for your consideration under separate correspondence.

## **VI. Recommendations**



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The following recommendations are intended to work together in providing the best possible results; however, it is the choice and responsibility of the congregation and the leadership to decide what to do with these recommendations and how best to implement them.

- 1. Practice Normalcy:** We discussed a lot of good ideas and opportunities to improve, which are good things. However, it's also fair to note that after a difficult and unexpected transition, the congregation could use a period of calm routine. I would advise moving ahead with all the areas discussed in this report, and to keep everyone involved and informed, but do so in a manner deliberately designed not to overload the members' ability to absorb and act upon the processes that are put in motion. Allow yourselves the luxury of a bit of routine as you rebuild energies.
- 2. Develop a Stronger Stewardship Culture:** Nothing builds congregational confidence in the future like successful budget drives and an environment of shared contributions. Consider it a requirement to have one, preferably two, successful budget drives on the books before seriously considering a capital campaign. UUCLC is not in a stewardship crisis, but the gifts distribution profile and stewardship elements discussed earlier in this report indicate this is the right time for a broader and deeper conversation about being stewards and passing it forward.

Do not make this a focus just of the annual budget drive, but part of a continuing conversation all year long about the power of giving and the meaning of stewardship in community. Consider adult RE sessions around these themes, sermons throughout the year, suggested short readings (especially for leaders) and visitations by membership and stewardship teams with members to help them think about how they connect to UUCLC with their time, their talents/labor, and their treasure. Being a member means doing as best we can in all three categories. Stewardship, as an information area and as a mechanism to contribute, deserves a prominent place in congregational life and in the various communications tools in use.

In addition, I recommend discussions among the leadership about transparency and engagement on stewardship issues. Until lay leaders and staff are as comfortable talking about financial gifts as they are about volunteering of time, the stewardship culture will not be as healthy and supportive as it should be. There are many materials readily available to assist in these conversations. Consultant support for a meeting, offsite, or workshop can also be utilized if desired; sometimes having that outside voice helps break the ice on what has been an awkward subject for some.

Put serious time and resources into high quality visiting steward training and include a very high percentage of lay leaders in that pool of visiting stewards – this is leadership by example and it counts importantly. In regards to the board, examine how well you are preparing board members to be stewardship leaders, ensure board members are consistent pledgers at whatever level they can support, and expect board members to serve as Visiting Stewards for your budget drive in the coming year.



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The next annual budget drive is important for all the obvious reasons, and needs be perceived to be successful and empowering. Get this right before looking too much further into a possible capital campaign. Start building the stewardship calendar, recruiting volunteers, and setting aside training dates now.

#### **3. Continue to Develop a “Push Not Pull” Cross Functional Communications**

**Culture:** Several people mentioned challenges to good communications in the past. People need a balance of being included, informed, and consulted, but not overwhelmed. Good communications should be a deliberate focus area, not a byproduct, and one in which the level of satisfaction is regularly sampled.

The communications committee is focused on getting this up to standards – but they cannot do it alone. No meeting held by any group in the congregation should end without reference to the acronym WENK – “Who else needs to know?” It should be an explicit leadership function to ask that question and assign the responsibility to make the connection. When in doubt, share.

This is a good time to remind everyone in the annual meeting, in occasional publications, etc. that UUCLC has a lot going on, that the leadership fully recognize that there is no monopoly on good ideas, and no one deliberately withholds information. In that spirit, ask everyone to be proactive: if you feel you are lacking information, someone else probably feels the same, so ask and encourage others to share information at every opportunity. A little mutual courtesy to each other (*we have events planned at the same time; let me see if I could move mine so people can enjoy both programs...I’m sorry you did not know about this – I should have thought to call you...*) goes a long way.

**4. Update and Broaden the Long Range Plan:** The long range plan is a good one as far as it goes, but it focuses very heavily on building and facilities issue. I recommend updating the plan, expanding the programs and aspirations elements, and putting a regular review/update/membership input process on the church and leadership calendars. The long range plan need not be a huge document, but it should capture your priorities and match up well with the vision and mission statements.

**5. Grow the Endowment:** The endowment is seed corn for the future, and an excellent tool to help everyone think beyond the next year or two – and to commit accordingly. Give the endowment far more visibility and interest, facilitate a legacy circle (prominently recognized in your common areas and at the annual meeting), and aim to have an endowment at least 2-3 times your annual budget. There are excellent guidelines and tools to accomplish these goals in Wayne Clark’s book, *Beyond Fundraising*, and on the UUA website, under the CONGREGATIONAL MANAGEMENT/FINANCE tabs. As a minimum, I would recommend having a growth and information plan in place, a Legacy Circle formed and first members on board before the end of this calendar year. Set targets for Circle growth and new assets



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pledged to the fund annually. Remember to include “*I would like to talk to someone about the Legacy Circle*” on pledge cards and other appropriate documents.

**6. Look Deeper at Your Membership Dynamics:** Quite a few visitors walk through the doors of UUCLC and while a good number become members, about the same number leave membership in a given year, leaving your numbers essentially unchanged over the past decade. This is not necessarily a good nor a bad thing, but it is an unknown. I recommend developing a Back Door subgroup to the membership team to develop a process to know when people leave and to engage those willing to do so to ascertain why they left. Similarly, a focus on helping more repeat visitors transition to memberships should pay dividends. This is a very specific focus effort, different from simply welcoming visitors. I encourage the membership committee (already a well functioning, high energy team) to dedicate itself to developing a membership growth and retention plan in some detail. There are many excellent resources available to you from the UUA. I will provide links and further information in separate correspondence.

**7. Address the Potential for Divisions by Subgroup:** As the congregation settles into a period of stability, this could be a useful time to begin some small group and congregational discussions about how everyone is feeling in terms of welcome and inclusion. Doing so requires a measure of good will and the assumption of good intent by all, and such discussions are usually best when facilitated. I suggest taking the lead from your minister as to how best to proceed and on what timeline.

Remember that facilitation of such discussions is one of the valuable services offered by District and Region, as this congregation knows first hand. Calling on that slightly outside presence to facilitate such discussions might make the process easier and more productive for all. Take these not as a risk of argument but as an opportunity to build community, to talk to each other rather than about each other, and to share your hopes for this community. The topic came up exceptionally often during our meetings, indicating there is desire to live right relationships in this regard.

**8. Mission and Vision:** As was noted earlier, the mission and vision statements are not living documents for the congregation. As a first step, I recommend making them a much more prominent part of congregational life to see if they resonate. For example, essentially all meetings could begin with reading these statements and then asking throughout the meeting how the actions and decisions being contemplated serve the mission and vision of UUCLC.

An excellent mission and vision set are easily remembered, the members instantly recognize it as “*Yes, that’s who we are and that’s what we aspire to be,*” and visitors can read them and know clearly what you are about.

Give your mission and vision statements visibility and use them to see if they meet these standards. If so, all the better. If not, change them. Under the last portion of this report, I have included an offering of consultant support to develop such statements,



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using our *Search for the Future* process. This is quite different from any other mission and vision process I have seen, and it works. It's fast (done in a weekend), is high energy, involves the entire congregation, and uniformly delivers superior results. It's more of a heart than a head process and people almost always come out of it energized and owning the statements. However, the current UUCLC statements were just recently developed and have yet to be truly utilized. I do NOT recommend this step if you determine your current statements meet your needs.

- 9. Special Funding Issues:** The issue of how to facilitate special project funding by generous members while preserving a democratic and inclusive process can be addressed without much difficulty, and doing so has benefits all around. I recommend the following process:

*Encourage unrestricted giving.* This is an area the leadership is already looking at and is moving in the right direction. There will always be times wherein someone wants to give for a particular requirement; that can be welcome on a case to case basis, but as a general guideline, giving to the general needs of the congregation and allowing the elected leadership to allocate those resources is preferable.

*Ensure a clear and well-understood policy* that any special gift should not, under any circumstances, cause the donor to reduce his or her regular financial commitment.

*As a matter of policy, be exceptionally cautious* about accepting any gift that comes with conditions or does not meet an identified priority of the congregation.

*Establish an Unfinanced Requirements List.* This is a wish list of items the congregation would purchase if funds were available. Be creative as to how this is administered (Board, Finance, a Special Task Force, etc.) and encourage congregational input (for example, after the service on a given Sunday, a list that has been developed over time of candidate ideas is posted and everyone gets 6 sticky dots to support 1 – 6 ideas. Those with the most dots are the priority for gift funding). Consider placing the resulting list in bands (high priority/important/nice to have) rather than fixating on what is number 14 vs. number 15. Update the list annually. Encourage those who are able to do so, including groups that pool funds, to support the list.

*Ensure* all gifts are recognized gratefully.

- 10. Reengage with the University:** The potential for membership growth at UUCLC and the ability to help grow the UUA with departing students is too important to allow the effort to languish. Develop a sustained engagement plan with both faculty and students and include activities on campus as well as at UUCLC. Consider sending notices to regional UU congregations that you have a vigorous welcome program for students and would welcome knowing about any UU students coming to the University.

One congregation I worked with started a small radio program on campus, with



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excellent feedback and walk in results. UUCLC might consider something along these lines, or a blog that is advertised on campus.

**11. Continue the Process to Decide What's Next on the Capital Improvements:** The Building Feasibility Team is well underway in ascertaining what might be possible for a capital improvements project. This will shortly lead to an appropriate time to take preparations to the next level before considering a capital campaign. If a facilities program is to go forward, it likely will be along the design elements already developed, either as a single project or phased, as financing makes possible.

As we discussed, it may be helpful to engage in a process to divide these options into the following categories: High priority/ Desirable and Valuable/ Nice to Have/ Not Worthy of Pursuit for the Foreseeable future. These need not be large “town meetings.” Use a more retail approach of small groups or adding a few moments onto other events to capitalize on people coming together. Save the larger town meetings for more final or larger decisions. Catch up and sustaining maintenance and accessibility should be high on the priority list.

Continue developing the designs, including high – medium – low proposals and cost estimates. This facilitates thoughtful consideration of options and cost tradeoffs should that be necessary in the months ahead. Commit to a process, including agreed upon goals and tasks, to ascertain clearly what benefits would accrue to your mission as a community from each option. The standard should be clear to everyone that this analysis will be done as thoroughly as it needs to be, as transparently as possible, and as quickly as it can be done correctly. Develop a planning calendar, but when forced to choose between process and a timeline, favor process and outcomes.

Once these steps are complete, it will be evident if the congregation needs or wishes to undertake all program elements or to stage them over a longer period. This process, when matched with the stewardship and finance elements already discussed, will likely put UUCLC on a successful path for whatever is decided. If, at the conclusion of these steps, a capital campaign seems appropriate, steps can be taken to accurately measure what could realistically be raised and what may be financed (if any).

Part of the discussion by that point in the process should include debt. As we discussed, a small amount of debt service is not necessarily a bad thing, especially if it is affordable and if it makes a possible an end result that more closely matches aspirations. If debt can be avoided, fine; but it should not be a show stopper in the abstract. Final decisions to proceed can be made once its clear what the congregation wants, what fund raising capacity exists, and what debt service may be considered, if any. Preparing a capacity estimate at this time, short of the aforementioned steps would be unlikely to yield accurate or encouraging results.





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There is an understandable eagerness by many to get on with a building program. My best advice is to first ensure the financial and stewardship issues are healthy, as demonstrated by clearly successful annual budget drives and a more balanced giving profile. This should give everyone increased confidence in the prospects for a capital campaign and ensures that the operating budget will not be negatively affected by a capital campaign. The good news is that these foundational elements can be reinforced at the same time building options and scenarios are being developed. The process need not be linear or excessively lengthy. The timelines presented in Section VII of this report assume this sequence, but should the leadership feel strongly that they wish to proceed sooner with any particular step, the timelines could be so adjusted.

#### **VII. Proposed Time Lines and Implementing Selected Recommendations**

The steps listed below generally should be carried out in the sequence indicated. How quickly they occur is up to the leadership to decide – the dates below are notional - events may move faster or slower, as is best for the congregation. Keep in mind that these activities often take longer than expected and so a healthy balance of push and prudence is appropriate. The standard should be *“We will do all of this as fast as we can do it right.”*

IMMEDIATELY- Share this report with the congregation and schedule meetings to discuss the recommendations in this report and how best to implement them.

JUN 2014 - AUG 2014 - As recommendations are accepted and adopted, establish and publish a calendar of events and deliverables so everyone knows the benchmarks, timelines, and goals along the way. Update it as progress is made. These need not be complicated projects and large numbers of new volunteers are not required. Use small, informal task forces to implement the recommendations beyond those specifically in the capital project.

JUN 2014 – DEC 2014: Refine and narrow the capital program variables and cost estimates. Commit resources to this stage as needed to provide the congregation high-resolution data for their consideration. Reengage the congregation in a series of small and large meetings (not just large special meetings, but also meeting with people in their committee meetings and other gatherings – make it easy for people to access the information and to digest it in small packets over time).

JUN 2014 – JAN 2015: Complete the stewardship, financial management, and other recommendations. Establish objectives and measures of success for each area early in the process. Consider a Stewardship Retreat for leaders and/or a Stewardship Saturday for interested members of the congregation who wish to learn more about stewardship as a part of ministry. Either of these workshops should work around the planned sabbatical to ensure the minister is able to take part. Plan, train for, and conduct an excellent annual



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budget drive that builds confidence, energizes the congregation, and improves stewardship income and distribution; this should be a major priority.

EARLY-MID 2015: Complete data gathering and options development for the campus. Present to the congregation in the manner we discussed, culminating in one or more congregational meetings, and moving forward in harmony with congregational decisions to build or not.

If the decision is to build, begin detailed planning for a capital campaign, based on the project cost estimates and with the expectation that the Financial Feasibility Study (FFS) will provide a financial capacity range that is acceptable. If the decision is not to build, begin planning to maximize use of existing facilities. Begin planning for a second successful annual budget drive in any event.

MID-LATE 2015 – Assuming a successful annual budget drive, consider a decision to build or not. If the decision is to build, conduct a Financial Feasibility Study after completing a second strong annual budget drive in 2016 (you may elect to do so in 2015 if all else comes in with encouraging outcomes).

Keep in mind throughout these processes, the criteria for success in a capital campaign identified in the materials I am forwarding to you in addition to this report. Success is more than just raising the needed funds; it also has to do with good communication, staying in community, and ensuring the viability of programs and the vision of UUCLC.

#### **VIII. Consulting Options**

Nothing proposed in this report mandates consultant support. Most initiatives can be expected to go far more smoothly and conclude with more satisfactory results when using the services of a consultant, but when that represents a best investment of congregational resources is a decision for the leadership to determine in each area.

While consultant support can substantially improve the outcome in all of these areas, one area is especially critical to have consultant support: the conduct of a Financial Feasibility Study (FFS) should you go forward with a capital campaign. Outside, objective data gathering and analysis of this area is essential for program prospects, for congregational confidence that such a project can be accomplished and sustained, and to assure any potential lenders your capacity estimates are realistic.

The leadership is free to consider its choices for future action with full, some, or no consultant support, utilizing all or portions of the recommended consultant support noted in this report, and to ask for further information if needed to make those choices. If a consultant is requested, the option is yours to request that Bill return or that another consultant be made available. I am pleased to note that as a Fair Share Congregation, UUCLC enjoys a very favorable pricing structure for consulting services, representing a



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significant savings in costs (20%) for consultant services. Recommended consultant services are at Annex C.

### **IX. Additional Materials and Information**

As we discussed over the weekend, I will provide by separate correspondence guidelines, links, samples, and recommended reading in many of the areas we discussed. These will be provided to the visit point of contact and others for further distribution as appropriate.

### **X. Conclusions**

It was a genuine pleasure working with and meeting the leadership and so many members of UUCLC. I am especially grateful for the opportunity to meet members at Sunday services and at the Roundtable, and for the hosted dinner on Friday evening. These informal gatherings greatly enhanced my understanding of UUCLC.

This congregation is important in the lives of its members and to the local community. UUCLC is at an interesting period of transition and congregational demographics, presenting new opportunities for the years ahead.

In short, there is much to celebrate, much potential to develop, and work to be done. There is no reason UUCLC cannot meet the goals it sets for itself when those goals are based in due diligence, thorough process, and a spirit of community. If I were a member of this congregation, I would find much to celebrate and much to look forward to in essentially all areas of congregational life.

The congregation has the leadership and the sense of community to make the right choices. The developmental ministry you have begun also provides opportunities for much desired continuity and stability. A realistic and complete planning process with clarity in your priorities will bring the membership where it wants to be. Stay in community, be patient and trusting with each other, and celebrate your successes; you are up to the challenges and the opportunities.

Best wishes and continued admiration to all. I welcome any questions that may arise from this report and would look forward to the opportunity to work with UUCLC again.

William R. Clontz

William R. Clontz

UUA Congregational Stewardship Consultant

May 26, 2014

### **Annexes**

Annex A: Visit Schedule

Annex B: Distribution of Annual Financial Commitments

Annex C: Recommended Consultant Services



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**Annex A**

**UUCLC Next Step Visit Schedule**

*Bill Clontz, Stewardship Consultant, Unitarian Universalist Association*

**Friday, May 16 2014**

- 1:30-2:30 PM Meeting with Office Administrator, tour of all buildings and grounds.
- 4 to 5:15 PM Meeting with Rev. Redfern-Campbell and Director of Music: Introductions, goals for the weekend, discuss insights into congregation.
- 6:00-8:30 PM Working/Get Acquainted dinner. Attended by about 14 leaders (formal or informal), as selected by the congregational leadership, reflecting the congregation in broad profile.

**Saturday, May 17 2014**

- 8:30-9:30 AM Stewardship, Annual Budget Drive Chair and team(s)
- 9:45-11:00 AM Endowment and Finance teams
- 11:15-12:00 AM Building Feasibility/Strategic Planning/AI, Bldg. and Grounds
- 12:15- 1:30 PM Working lunch with the Board and other leaders
- 1:45 - 2:30 PM Religious Education Team
- 2:45 – 3:30 PM Social/Environmental Justice Team
- 3:45 - 4:30 PM Membership Committee
- 4:45 - 5:30 PM Communications Team
- 5:30 - 6:15 PM Tombaugh Gallery
- 6:15- 7:15 PM OPEN TIME (Any interested individuals or groups – 8 attended)

**Sunday, May 18 2014**

- 9:00- 10:00 AM Bill Clontz attends Sunday service. Brief comments to the congregation.
- 10:00-10:30 AM Initial Feedback from Bill to the Leadership
- 10:30-11:30 Bill meets with the Roundtable.
- 11:30 -12:30 Bill attends coffee hour, talks with anyone interested one on one.

**Two weeks after Visit (June 1st):** “No Later Than” target date for Next Steps Report with recommendations and schedules to the congregation to be provided by Bill.



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**Annex B**  
*UUCLC Quartile Analysis*

Total Number of Households: 121      Average: \$1845  
Total Amount Committed: \$221,361      Median \$1,200      1 Quartile = \$55,340

**What is a Quartile Analysis and Why Is It Important to UUCLC?**

**Quartile analysis is a proven analytical tool to illustrate how well we share the distribution of gifts among the congregation.** Naturally, some of us are able to give more than others, and any distribution graph will show that. Quartile analysis takes that reality into account by providing a model healthy distribution and then compares our profile to that model.

This shows us how fairly we carry the load and whether we are vulnerable to severe imbalances, such as too few people contributing too much of the total or too many of us contributing too little. An ideal profile looks like a gradual set of steps, over which members can advance over time, moving from a lower to higher, as involvement and commitment develop.

**How does it work?** To create a quartile analysis:

We add up the total *dollar amount* of pledges received in a year.

We arrange all of the commitments in descending order, from largest to smallest.

Next we add up the gifts, starting with largest and going down until we reach a total amount equalling the first quartile (25%) of our total dollars pledge amount. To determine the first quartile of giving, add the largest commitment to the next largest and continue until you reach 25 % of the total dollar commitments.

In an ideal balance, about **10%** of us contribute this first 25%; at UUCLC, we have only **6%** of us contributing this amount.

Continue down the list of commitments until the total reaches the next 25%, (showing cumulatively 50 % of total pledge amounts) to determine the second quartile of giving. Ideally, about **15%** of us contribute this next 25% of our total; we are close, at **13%**.

Follow the same procedure to determine the third and fourth quartiles of giving. A good balance for the third quartile would have **30%** of us contributing this amount; for UUCLC, it's only **19%**.

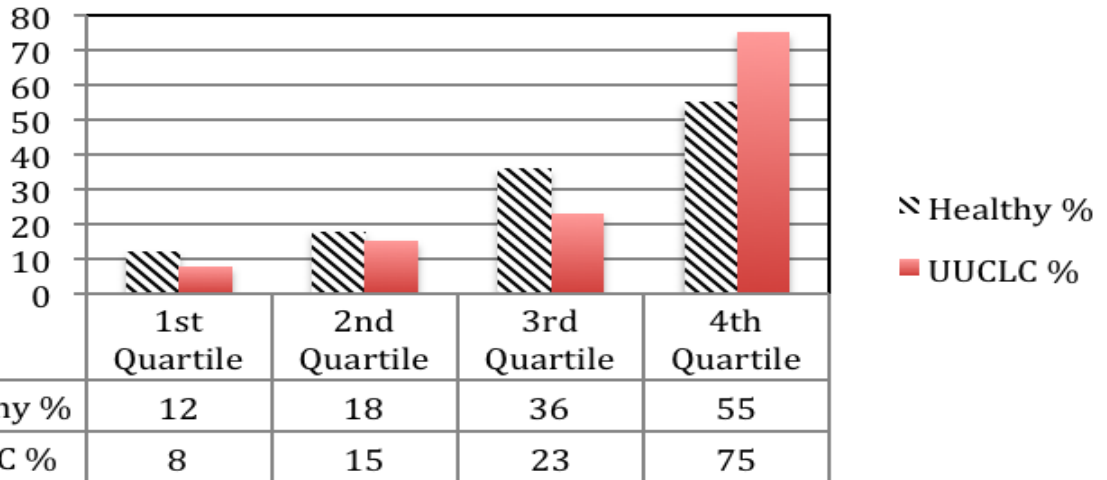
The last **25%** comes from about 45% of us in a good balance; for UUCLC, it is a very large **62%**.



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Quartile	Number of households	Healthy Distribution, based on 121 households	% of Total Donors	Healthy % of Total households	Amount Committed	Quartile Average Commitment
1 <sup>st</sup> Quartile	8	12	6%	10%	\$54,800	\$6,850
2 <sup>nd</sup> Quartile	15	18	13%	15%	\$52,700	\$3,596
3 <sup>rd</sup> Quartile	23	36	19%	30%	\$55,152	\$2,266
4 <sup>th</sup> Quartile	75	55	62%	45%	\$58,749	\$783


**UUCLC Distribution of Annual Commitments**





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**Annex C**  
**Prospective Consultant Support**

<b>Task</b>	<b>Prospective Schedule</b>	<b>Consulting Time and Costs</b>
<p><b>(1) Support to 2015 and 2016 Annual Budget Drives (ABD)</b></p> <ul style="list-style-type: none"> <li>Assistance with campaign planning, materials review, organizing, recruiting, and communicating with the congregation about the budget drive (and how it relates to the potential capital campaign).</li> <li>ABD execution, training for visiting stewards, and lessons learned analysis.</li> </ul>	<p>6 - 9 Months Prior to Campaign</p> <p>Telephone/Skype/email/ Onsite</p> <p><i>A consultant provides increased assurance of a successful annual budget drive, which also is a precursor to any capital projects</i></p>	<p>1.0 day on site            1.0 day on line support            1.5 days travel</p> <p>\$6,300 as a Fair Share Congregation</p> <p>Repeat for 2016.</p> <p>A contract may be established for both years or only the first year initially.</p>
<p><b>(2) Leaders Stewardship Retreat</b></p> <p align="center"><b>AND/OR</b></p> <p align="center"></p> <p><b>(3) Stewardship Saturday- A Congregational Workshop</b></p>	<p>TBD – Last half of CY 2014</p> <p>Telephone/Skype/email/ Onsite</p> <p>TBD – Last half of CY 2014</p> <p>Telephone/Skype/email/ Onsite</p>	<p>0.5 day preparation            1.0 day on site            1.5 days travel</p> <p>\$5,400 as a Fair Share Congregation</p> <p>One half day + training for leaders and others selected on leadership in stewardship techniques, responsibilities, and processes.</p> <p>0.5 day preparation            1.0 day on site            1.5 days travel</p> <p>\$5,400 as a Fair Share Congregation</p> <p>6 hrs. of education and participation for the congregation with lectures, workshops, discussion, and case studies. Enables thinking positively about resources and stewardship.</p>



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<p><b>(4) Financial Feasibility Study (FFS):</b></p> <ul style="list-style-type: none"> <li>Assist in developing list of study participants.</li> <li>Conduct approximately 20 interviews. *</li> <li>Prepare analysis and report as to the level of support for the project within the congregation and amounts likely to be raised in a capital campaign.</li> </ul>	<p align="center">TBD 6-9 Months Prior to Campaign</p> <p><i>Conduct of an FFS by an independent consultant provides a higher assurance of accurate capacity estimates, and can be valuable when negotiating a loan.</i></p>	<p>1.0 day for study preparation — development of questionnaire and participation criteria</p> <p>3.0 days for 20 one-hour interviews on-site*</p> <p>1.5 days travel</p> <p>2.5 days for data analysis and report preparation</p> <p>TOTAL For FFS: 8.0 days, \$14,400 as a Fair Share Congregation</p> <p>* 20 interviews represent approximately 20% of pledging households, the recommended number necessary to make a reasonable prediction of a financially feasible capital campaign goal.</p>
<p><b>(5) Support to the Capital Campaign</b></p> <ul style="list-style-type: none"> <li>Assistance in planning campaign, review of campaign materials, information sharing with the congregation</li> </ul>	<p align="center">TBD Starting approximately 6 Months Prior to Campaign</p> <p>Telephone/Skype/email</p>	<p>0.5 day preparation 2.0 Days online support 1.0 day on site 1.5 days travel \$9,000 as a Fair Share Congregation</p> <p><i>A capital campaign should only be considered after a successful annual budget drive, and ideally after 2 such successes. (A combined Annual Budget Drive and Capital Campaign, may be considered).</i></p>
<p><b>(6) Search for the Future Mission and Vision Development</b></p>	<p align="center">TBD</p> <p>Telephone/Skype/email/ Onsite</p>	<p>0.5 Day preparation 0.5 Days online support 2.5 Days on site 1.0 Day Analysis and Report</p> <p>\$8,100 as a Fair Share Congregation</p>





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<p><b>(7) End of Process Review</b></p> <ul style="list-style-type: none"> <li>A post-activities review with key leaders, establishing lessons learned and the way forward after all activities (ABDs, FFS, and/or Capital Campaign</li> </ul>	<p align="center">TBD</p> <p>Telephone/Skype/email/ Onsite</p> <p>By the time all of the preceding elements selected have been executed, the congregation and the leadership will have a valuable level of experience and expertise.</p> <p>This review ensures those lessons are retained and applied in the future.</p>	<p>0.5 day preparation 1.0 day on site 1.5 days travel</p> <p>\$5,400 as a Fair Share Congregation</p>
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UUA consulting fees are \$1,800 per day for Fair Share congregations the size of UUCLC. Fees are \$2,150 per day (20% more) for non Fair Share congregations of your size.

The Fair Share rate has been utilized in the future consulting options portion of this report. The daily rate is all inclusive of labor and travel expenses. Charges are assessed only for time worked and for time spent in transit, capped at six hours travel for billing. No charges are assessed for actual travel costs, meals, or lodging. All contracts contain a not-to-exceed cap.

The consultant would work with you through any engagements to manage your costs to assure greatest value.