

Saturday, December 13, 2008

Maureen Meslovich
President, Unitarian Universalist Society of Cleveland
2728 Lancashire Road\
Cleveland Heights, OH 44106-2505

Dear Maureen,

I obviously enjoyed meeting you all and sharing my weekend with you. Thank you for inviting me. Our UUA Stewardship Consultant Assessment Weekend starts my relationship with you as your on-going resource.

The attached assessment report documents my findings and gives you my specific recommendations. At the end of the report I have listed a possible timeline and ways I can continue to help you to move forward.

Before our weekend together you sent me most of the long list of information I requested – thank you. On Friday I did a tour of the building with Rev. Colin Bossen and your RE Director Nathan Staples. Afterwards at dinner I was very warmly welcomed by most members of your Board and we discussed your hopes for the weekend and your thoughts on renovating space. Later Friday evening I led a focus group with four new members.

On Saturday morning I led an open invitation workshop attended by about 20 people including Board members and other interested members. This workshop included exercises that let me learn a lot about your history, who you are, why you are together, and where you want to go together. Based on your desire for continuing your growth, we discussed what those joining faith communities today are looking for. We then listed your barriers to doing more programming. Those attending shared the reasons they give to UUSC and we looked at how through increased stewardship you might be able to attain your goals with financial security.

After lunch I met with those involved with your finances to review your current financial position, your fundraising history and future financial options. I then met with those interested and affected by membership growth including your RE committee. We reviewed your increase in attendance, the steps taken to interest and invite more members, grow membership and how UUCS moves visitors to membership and further involvement.

I finished Saturday with a meeting with the Board, members of your long range planning group, Rev. Bossen, and your DRE, Nathan Staples. We summarized what had been learned and your possible next steps.

On Sunday at a town meeting after the service with about 40 members, I reviewed what I had learned, discussed spiritual stewardship, and described the comprehensive strategic planning process as a lead into to a possible capital campaign.

Our intense weekend, together with the information I requested, and the responses to the 22 confidential surveys I received (see attachment) has enabled me to write this detailed assessment report. Thank you for the opportunity to assist you with this assessment. I look forward to continuing to partner with the members and friends of UUCS in your bold adventure.

Frankie Price Stern
UUA Congregational Stewardship Consultant

cc: Rev. Colin Bossen, Minister UU Society of Cleveland
Wayne Clark, UUA Director of Congregational Stewardship Services
Jess Honsky, Board Member Consultant liaison
Rev. Joan Van Becelaere, Ohio Meadville District Executive

att: Stewardship Consultant Assessment Report, Confidential Survey Responses Summary,
Searching for the Future information sheet

UUA Stewardship Consultant Assessment Report for the UU Society of Cleveland

Submitted by: Frankie Price Stern after December 5-7, 2008 congregational visit

I WOULD LIKE TO HIGHLIGHT EIGHT STRENGTHS I FOUND

- 1) You are a faith centered, loving congregation.

The responses I received from the confidential surveys and from new members for the question "How has your membership at UUCS changed your life" clearly show members highly value the UU faith centered community you give each other. Responses tell of a faith sharing community of great people providing strong friendships and caring support. A longer term member at the Saturday workshop said "What we do here is important!".

- 2) Your new members say they found more than they expected at UUCS.

At the start of their focus group new members told me how excited they were to have found the UU faith and your warm, non-judgmental (a word used repeatedly) community. All wanted growth so others could have what they have found here.

New members told me what delights them most about UUSC are the many shared opportunities for spiritual growth.

One new member in response to my question "what do you hope for the next new member who walks in the door?" said -- after coming in and sitting down s/he breathes out, relaxes and says "I am home!".

- 3) Your members seem to have a mostly consistent view of who you are, what is special about UUSC, and the desired future of the society

Looking at your membership history, you reported membership of about 90 from 1991 until 1997. From 1998 till 2005 membership declined to 70 and then to below 60. Over the last 2.5 years, since your interim period and Rev. Bossen was called, you have grown back to over 90 members. On Saturday morning attendees divided into these three "generations" that are each about one third of your current membership.

All generations identified the special uniqueness of UUCS in valuing different views and sharing beliefs. Almost all present strongly supported planned growth, There is a widely held desire to keep UUSC's uniqueness while being very welcoming and inclusive to new members.

During the exercises it was clear all want to carefully listen to others in the decisions about your future. (Note the interest in young families by long term members and the desire for accessibility improvements by the younger, newer members.) Mid and long term members do want to increase the presence and influence of UUSC in the local community. Mid term and recent members mentioned your great location and saw the need for facility improvements.

During the exercise on the growth the generations groups had similar views on membership sizes and what would drive the growth.

What DELIGHTS members of each generation about UUCS:

Long term members (More than 10 years) -

SPIRITUALITY: creative theology; people who share like minded curiosity; high quality lay and minister led services; services are challenging and intellectually and spiritually stimulating

COMMUNITY: creative people; informal; welcoming place; growing – youthful; a lot of work to do (together)

Mid-Term Members (3-9 Years}

SPIRITUALITY: worship services give a sense of renewal – centering -- leaving the world behind; deep personal conversations

COMMUNITY: great people; intergenerational; warm & welcoming; many small groups;

FACILITY: great location

Recent New Members (2.5 Years or less)

SPIRITUALITY: variety of beliefs and people willing to discuss them (thoughtful and informed approach); small group activities

COMMUNITY: people who are unique; non-judgmental; lots of food-centered community activities

What are each generation's FUTURE WISHES for UUCS?

Long term members (More than 10 years) -

SPIRITUALITY: Continue to attract people with controversial ideas who are willing to listen

COMMUNITY: see financial stability continue; keep sense of play -- joyful community; grow numerically and retain members; add more support for parents; more intergenerational interaction

OUTREACH -- MAKE A DIFFERENCE IN THE WORLD: be better known in the community; be a resource for the community; have political and social clout

Mid-Term Members (3-9 Years}

SPIRITUALITY: share the delight; holistic interactive services

COMMUNITY: increased membership; strength to have longevity; successfully navigate growth; keep community feel; share sense of responsibility for participation;

FACILITY: maximize the value of location; facility improvements

MAKE A DIFFERENCE IN THE WORLD: more outreach; be the "go to" church for liberal views

Recent members (2.5 Years or less)

SPIRITUALITY: continue to be a place of support, enjoyment and rejuvenation; further expansion of RE (children and adult) program

COMMUNITY: pare down/combine committees; less leadership burnout; increase organization;

FACILITY: more handicap accessibility

Membership size in FIVE YEARS with reason(s)

Long Term Members – No growth: Facility is restricting, Have too much change

-- 150-200: Work together as a community to resolve issues -- e.g. consistent quality of services

Mid-Term Members – 125-150: Vibrant community, full time minister, younger membership, Sunday school improvements, more attention to facility, more money resources

Recent Members – 125-150: follows current growth trajectory, full time minister, more activities, new member "marketing"

Membership size in TEN YEARS with reason(s)

Long Term Members - 200: After adding another congregation in Cleveland (400 - without split)

Both Long term and Mid-Term Members -- 150-175: Location, parking solutions, facility improvements

Recent Member: 200: Move form "Family" size to "Pastoral" size appropriate organization, improve space,

- 4) From a recent study of mega churches, those seeking a faith community to join are looking for what your current 5 year plan focuses on: TRANSFORMING SPIRITUALITY, AUTHENTIC COMMUNITY, and the ABILITY TO MAKE A DIFFERENCE IN THE WORLD.

You have made strong progress on your 2005-9 Six Plan goals:

1. Provide high quality, diverse worship
2. Develop a strong life-span religious education program
3. Increase net membership by at least 50 new members
4. Improve handicap accessibility
5. Improve appearance of facilities
6. Focus action on social justice in line with UU principles

- 5) Your members are committed to offering a quality children's RE program.

As part of your 5-year plan you hired a DRE who is a valued staff member. Many of those joining over the last 3 years are young adults without young families, but your Director of RE told me there has been recent accelerated growth in children's RE attendance. Children are welcome and fully included in the first part of your Sunday Services and in all appropriate community activities. And more than enough members are offering (and excited) to be RE teachers.

- 6) You are growing fast, and you have a significant number of very active recent (last 3 years) new members.

Your board and long range planning team includes members from all generations and age groups.

You are currently a fast growth congregation. Rev. Bossen told me 23 members joined during the 07-08 church year. Attendance increased over 50% during the 07-08 church year and is on track to increase over one third this year. Your goal #3 – adding net 50 members by the end of 2009 certainly seems within reach

- 7) You have recently started working on good organization and processes appropriate for your size.

You told me you are intentionally trying to move toward a more formal and streamlined leadership style. You also told me you are looking at more effective strategies for communication. Currently your Board works well together and listens carefully to each other. The Board seems to focus on the right issues of planning and financial health. However, your financial reports will need to be much clearer as your financial situation becomes more complex, and I suggest a more comprehensive strategic planning process. I have made recommendations for a new planning process later in this letter.

- 8) You have a very welcoming, informative and easy to navigate web site that is inviting to future seekers

THERE ARE FOUR CONCERNS I WOULD LIKE TO SHARE

I have included my recommendations

- 1) About 5 years ago you received significant bequests that you are investing in the revival of membership growth in your Society. From private conversations your members seem to have varying views about the advisability of "spending down" your "endowment".

Generally some members do not seem to understand the finances supporting your growth plan and goals. There seems to be differing views and concerns about how much of your cash assets will be spent and how much will be left.

Wonderfully, your current cash resources are close to \$1.1M. Only approximately \$96,000 is legally restricted to protect the principle. You are treating/calling most of your cash as an endowment, although it is not legally restricted. Since it is not legally restricted, some members have concern that leaders can/are planning to spend down the money beyond what is known. Others feel the money should be used to supplement operational costs so current members will not be asked to give more during these difficult financial times.

For long term security, at a minimum you should have a legally restricted endowment fund large enough to maintain your financial stability for at least a year and at best two years should negative events happen.

I suggest you plan to reserve a significant part of your current cash assets as a legal endowment.

I suggest one of the most important outcomes of your new comprehensive plan will be a detailed financial plan which is very clear on what portion of your cash assets you will need to invest in your continued revival, and what you will ask your members to donate annually and through a capital campaign.

2) Some of your leaders feel they are being asked to do too much and they are concerned about burnt out.

It is important you prioritize and intentionally develop your leadership resources as well as your financial resources as you grow. It is also important to ensure members are invited to contribute in ways that help them feel valuable, excited, and connected.

As a separate issue, moving through the steps toward a capital campaign will take even more leadership and helper resources. Success may depend on either cutting back in certain areas or asking other members, or staff, to do the tasks your carefully selected future Comprehensive Planning and Capital Campaign leaders are currently doing.

I suggest you start a community wide conversations on how you can streamline some tasks using new ways; you ensure members who are contributing their energy feel fulfilled, rewarded and thanked; and you consider moving some volunteer tasks to staff hours.

I also suggest t a leadership development plan be part of your new comprehensive plan.

3) I am concerned you want to move ahead to resolve current space needs without having a master plan for your space.

You are already discussing how to add 2 more RE rooms, to better configure your office space, and to add accessibility. This work can be started immediately since it can be funded with "endowment" funds. But, any immediate space work needs to be done as part of the path toward a master space plan.

We discussed creating a master plan for your 10 year space requirements as soon as you can. I strongly suggested hiring a professional to assist you with this. Defining your needs and finding the right use of space for your future should be a careful multi step process. I did advise at your size having separate social and Sunday services space is rarely affordable, and you will need to predict the increase in ratio of children to adults, to most effectively plan your space needs.

I suggest making any "emergency" space changes as temporary and as inexpensive as possible.

To speedup the process I suggest creating your 10 year space master plan in parallel with developing your Comprehensive 5 year Plan.

You have grown to a size where you need a guided formal decision making process.

In smaller and/or slow or no growth congregations decisions are arrived at often through informal discussions between members during coffee hour, during activities or in the parking lot, rather an in formal sessions. You are currently a Pastoral Size congregation. I suggest you have congregational decision meetings at every important step you take to plan your future. If you are asking yourselves "Do we need a congregational vote" I suggest you do. The discipline of communicating all facets of a decision to your members before they vote will mean they are fully involved along the way.

I recommend a three step decision process:

- 1) Board ensures the step being considered clearly states how it supports your mission and vision statements.
- 2) Board/Lay leaders host "Information Transfer" Town meeting(s) with 3 parts
 - a) Discuss details of proposal – information questions asked
 - b) Members Identify issues -- Pro/Con – without taking a position

- c) Leader selects a few top issues for possible resolutions
- 3) The formal Congregational meeting is held for the vote. To assist informed decision making, the formal notification of the meeting should include all the issues and possible resolutions from Town Meeting(s).

RESPONDING TO YOUR HOPES FOR OUR WEEKEND TOGETHER

Before I arrived you asked specifically for help with your finances.

- *How to increase your pledging and other fundraising.*
- *Evaluate the feasibility of a capital campaign.*

- 1) You can raise significantly more operating income by asking ALL your members to contribute a personally significant gift based on their resources and the value of the congregation and its mission to them, their families and your local community.

Your current average Financial Commitment is \$1,228 which is about \$100 below the median for your size. Since you are planning for growth, you are currently using your endowment to staff for a much larger (125 member) congregation. Responding to requests to fund this increased budget level, a few strongly committed members have significantly increased their giving over the last three years and now over 25% of your members' financial commitments comes from just 4 households

Currently about 75% of your budget compensates your staff (60-65% is typical) while the budget for maintaining your space is limited. Even with membership growth, your lower giving will continue to slow your progress toward your goals. We discussed to have more your members, each to their ability, involved in funding the future of your society together. I suggest you need to be more specific about the level of giving required to support your mission and growth goals. If you are not, you will quickly spend down your cash assets as you continue to afford what your mission requires.

Our exercises on Saturday and the survey responses show members do know there is much abundance at UUCS and there is excitement about your future. From the exercise on sharing we learned the largest group of your members do not give to budgets. They give because the congregation is important to them in personal ways. They give because "their heart is involved". Stewardship for this largest group is not primarily about what UUCS needs, it is about why members and friends want to and can contribute to the future you all want together. Community Financial Stewardship is about the personal value of UUCS to each of your members and friends with everyone fairly sharing their resources to your compelling vision of UUCS' future.

One member told me "fairness" is a strong UUCS value. Our UU values suggest your members should be asked to make Financial Commitments proportionate to how important UUCS is to them and proportionate to their individual financial resources. If your members all give at or close to the UUA Fair Share Giving Guide levels you will be more than able to support the programming, the staff and the space you need and want.

I suggest your next Annual Budget Drive will be significantly more effective if all your members and friends ask each other for Fair Share donations. This request should be made in the context of a conversation about the value of UUCS in their lives and your plans together to grow the ministry of UUCS to each other, and within the Cleveland area. The Suggested Fair Share Giving Guide can be found at <http://www.uua.org/documents/congservices/stewardship/fairshareguide.pdf>

- 2) Your leaders told me you they want to revisit your mission statement and goals before you create your comprehensive plan. It is important that most of your members be invested and involved in creating the new mission statement and the first listing of the desired outcomes and goals to fulfill it.

The recent addition of many new members and the early success of your revitalization plan suggest to me that before starting on a comprehensive planning process you should create a new mission statement and vision. This was also a recommendation by the chair of your long range planning committee.

I strongly suggest a “Search for the Future” weekend of workshops. *Searching for the Future* is a series of focus group sessions designed for all members to together develop a shared vision and mission so specifically supportive objectives and goals can be created.

- 3) To reach your 10 year vision you will need know what staff and space you will need and what you can afford along the way. You will need to ask your members to adopt a Comprehensive 5 year Plan based on a new 10 year vision.
- a) I recommend you create three different financially balanced Comprehensive 5 year Plans so members can select the level of plan they want to afford together.
 - b) I recommend you appoint committed and open minded members to the Comprehensive Planning Team

The key to successful planning and a successful capital campaign is having a clear and involving process. Your plan will only be as good as the sum of every member’s contributions to it. Members of the Comprehensive Planning team should be selected because they have “Big Ears”, not because they represent a specific issue or group. It is Comprehensive Planning team member’s job to look at the mission and vision statements, ask as many members as possible the important questions, and then listen.

- c) The basic comprehensive planning process is MISSION→VISION→GOALS→RESOURCES AVAILABLE
 - i) MISSION→VISION STATEMENT: you will need to create a 10 year vision statement from your mission statement. Before you create your vision, you should have clear information on the surrounding communities you serve. As we discussed I have included information on acquiring Percept data under “UUA” below. I suggest you format the vision statement as vision sub-statements underneath the appropriate mission sub-statement. Start each one “In Ten Years...”. I recommend you do this in community through a series of Appreciative Inquiry Exercises during Town meetings (See chapter 3 in Wayne Clark’s *Beyond Fundraising* book mentioned below).
 - ii) VISION STATEMENT→GOALS I suggest you list your goals under the appropriate vision sub statements. List what you are already doing and then add the new goals that move you further toward the mission and vision.
 - iii) GOALS→RESOURCES AVAILABLE The “backbone” of your comprehensive plan will be a matching 5 year financial plan. The attainment of each goal will need to be costed and then staged to match expected growth and increase in income.

- 3) Before launching a capital campaign you will need a Feasibility Study to most accurately estimate how much money you can raise.

You must set as high a goal for your capital campaign as can be achieved. You will be offering each other staffing, programming and space investments matched to the amount you should be able to raise. To assure your readiness for a capital campaign and to estimate your achievable goal range your consultant will need to have confidential interviews with at least 25% of your membership. This is called a feasibility study. Among the steps toward a capital campaign, this is actually the most important use of your consultant.

- 4) For ballpark planning, how much money might you expect to raise for staffing, programming and space investments if you were ready right now to launch a capital campaign?
- a) As a rough guideline, you may raise in a Capital Campaign 3-5 times your annual giving = \$219,000 to \$365,000
- b) You may apply for a mortgage as long as loan payments are less than 25% of your annual operating budget. I recommend 15%. Affordable 7.5% loan for 10 years = \$190,000

SO, based on your current giving level, about \$409,000 to \$555,000 could be available for additional future capital investment. As in your current plan, to be a larger congregation a part of your capital investment will probably need to go toward ramping up your staff time and programming as well as to reconfiguring your space.

WHAT SUPPORTIVE RESOURCES ARE AVAILABLE?

The Ohio Meadville District

OHD has support available for growing congregations like yours. I am sending a copy of this letter to your District Executive, Rev. Joan Van Becelaere. Since the assumption of continued growth is your basis for taking these bold steps, I strongly suggest you consult with your District regularly.

As I mentioned to your membership team, I strongly recommend the free "*Ideas for Growth*" DVD produced by Jefferson Unitarian Church, Golden, Colorado. It is available from the District Office.

UUA

Many steps outlined in this letter are described in more detail in *Beyond Fundraising: The Complete Guide to Congregational Stewardship* by Wayne Clark. It is available from the UUA Bookstore at (<http://www.uuabookstore.org/productdetails.cfm?PC=709>). Colin mentioned he has already purchased one copy of this book. I strongly suggest you purchase more copies so your leaders can use it as a guide.

The UUA has contracted with Percept Group, Inc. to provide lifestyle, faith preferences and demographic data for a congregation's surrounding area at a reasonable cost. See <http://www.uua.org/documents/congservices/perceptinfo.pdf>. The *Planning a Ministry Focus from Your Ministry Area Profile document* will help you use your Percept demographic data to plan your growth and outreach efforts <http://www.uua.org/documents/congservices/ministryfocus.pdf>.

Many invaluable congregational resources to help you attract and embrace new members are also available on the UUA web site are. See <http://www.uua.org/leaders/leaderslibrary/hospitalityand/20011.shtml>. Marketing resources to inform and attract new members are at: <http://www.uua.org/leaders/leaderslibrary/marketing/congregational/101983.shtml>

HOW CAN I HELP?

Searching for the Future

Searching for the Future is a weekend series of focus groups designed to help a congregation create a mission statement, clarify its vision and create a starter list of goals that can later be incorporated into a long-range plan. It is a highly participative process, designed to incorporate as many members of the congregation as possible into small group sessions. The focus group sessions are lively and designed to make the process of clarifying mission and vision not only painless, but also actually fun.

Lay leaders, who are willing to help facilitate a group session on Saturday, meet on Friday evening with the consultant to go through the process of articulating vision, creating a draft mission statement and brainstorming goals in support of the mission. On Saturday, other fellowship members participate in one of the small group sessions going through the same process. On Sunday, the facilitators meet again with the consultant to blend the draft mission statements into one, which is then ready to go to the congregation for a vote. The brainstormed goals generated throughout the weekend are reviewed. The top suggestions are collated, and then distributed both to relevant committees for their review, and also to the comprehensive plan committee for consideration.

Suggested Timing: Winter 2009

Requires 1 Visit – 2.5 Days of consulting time -- \$1900

Annual Operating Budget Drive including Visiting Steward Orientation

I recommend your Annual Budget Drive organization (see *Beyond Fundraising* chapter five) be in place as soon as possible. Your first Visiting Steward process will require guidance through a carefully organized and step by step process. Working through these steps together should not only increase your Annual Budget Drive results, but will prepare you for your possible future Capital Campaign. One half day travel time to UUCS is included.

Suggested Timing: Winter - Spring 2009

Requires 2 Visits – 3.0 Days of consulting time -- \$2280

Comprehensive Planning

Your process to create three Comprehensive 5 Year Plans can work in parallel with the development of a master space plan. Both groups need to work together to publish an interim report by spring 2009 and the final report in mid 2009. After informational Town Meetings, the congregations should vote to select one of the three Comprehensive Plans. This way the congregation becomes committed to a single viable plan for your future. On-site consulting includes one half day travel time to UUCS.

Earliest Timing: Winter 2008 to Mid-year 2009

If a visit is needed 1.5 Days of Consulting time = \$1,140

Feasibility Study

A Feasibility study is necessary to understand your readiness and estimate the giving level of the congregation prior to your capital campaign drive. It will allow you to offer the largest affordable staffing and space project to your members. Your Feasibility Study will take 5 days to complete; one-half day to prepare, two and one half days for interviews and one day to write the report. One half day will be required to present the results to the congregation. One half day travel time to UUCS is included.

Earliest Timing: May - June 2008

Requires one visit -- 5.0 Days of consulting time = \$3,800

Capital Campaign

I am recommending you have a combined Annual Budget Drive and Capital Campaign Drive at the very earliest in the Spring of 2010. A combined campaign will encourage your members to raise both sufficient operating and capital funding for your future. Also, combining campaigns work well in smaller congregation since they preserves volunteer time. One half day travel time to UUCS must be included with each visit.

Earliest Timing: Early 2008 to Fall 2009

Requires three visits -- 4.5 Days of consulting time = \$3,420

Consulting Summary

This tentative calendar does show very aggressive timing to accomplish each step.

The UUA Office of Congregational Fundraising Services rate for on-site consulting services for small congregations is \$760 per day which includes all expenses. I do not charge for E-mail and phone consultation. As mentioned above, only one way travel time to UUCS is charged.

The total recommended consultant cost for this full process is 16.5 days = \$12,540 which is 2.6% of \$482,000 -- the midpoint of your capital fundraising based on your current giving level.

I wish all the members and friends of UUCS success in your bold adventure,

This report was submitted on December 14, 2008 by:

Frankie Price Stern
UUA Stewardship Consultant