



**UU Fellowship of Redwood City
September 17-19, 2010**

Minister: Rev. Julia Older
Board President: Lori Longo
Contact Person: Lori Longo, Amy Shaw, Walter Moore

Purpose

An assessment visit was requested by the 2011 Annual Budget Drive leaders as they prepare for the spring drive. They want to ensure that the annual goals are met, to minimize the competition for volunteers and ensure that the congregation has the resources it needs to keep the programs, ministry and worship strong.

Process

Background information was collected and sent to the consultant in advance of the visit. Materials included budget, most recent annual budget drive results and materials, membership and governance documents such as bylaws. While on site the consultant met with board and its committees as well as staff. The congregation was invited to participate in the Saturday afternoon session followed by a report to the congregation after Sunday service.

Financials

Financials as of July 1, 2010

Number of Members:	170	Number of Pledge Units:	102
Annual Pledge Income:	\$ 202,000	Annual Budget:	\$ 266,000
Mean Pledge:	\$ 1,597	Median Pledge:	\$ 1200
Mortgage:	\$ 0	Endowment:	None

Funds/Accounts

Reserve Accounts: As of April 30, 2010

Res Investment Income	\$ 10,634
Building Reserve	\$ 44,732
Compensation Reserve	\$ 6,000
Futures Reserve	\$ 28,012
Ministry Reserve	\$ 49,546
Music Reserve	\$ 2,492
RE Salary Reserve	\$ 792
Restricted Reserve/ Ansel Adams	\$20,000
Total Reserve Accounts	\$162,209

There is a separate budget for one time operating expenses totaling about \$30,000 covered with one time revenues largely from previous year expense savings. This budget was shown to and approved by the congregation during the annual meeting.

Strategic Plan

A strategic plan with a visioning process was last done in 2002 at the beginning of Rev. Older's tenure. In 2007, a Futures Committee looked at how to most effectively deploy existing resources and when various scenarios would require more strident measures.



FINDINGS AND OBSERVATIONS

Worship

Julia Older is a much loved minister whose worship services are coveted. The music program is enriching, inspiring and greatly valued. It is widely known but rarely discussed that Julia plans to retire in four years. In 2009-10, Julia took a four month sabbatical. The congregation had a challenging year with the loss of six members, three of which under tragic circumstances. The congregation rallied and also celebrated joyous occasions.

Beginning in October the congregation will address the question of what it means to “welcome all”. It is a question of diversity, setting intentions and incorporating cultural sensitivities. There is some passion around this issue and it springs from the heart of the fellowship’s mission: “Welcome all! We nurture each other on our personal and spiritual journeys as we work for peace, compassionate justice and a healthy planet.”

There is a robust music program and paid staff to give direction. This year the worship committee will present one Sunday each month with just music. There will be no hymnals as the congregation learns new music together.

Many congregants are members of C-Groups (covenant circles) and explore their spiritual life in these smaller groups.

Ministry

The congregation has a very caring attitude toward one another. In addition to a full time minister, there is a Caring Committee that is responsible for supporting congregants’ needs such as rides to appointments, assistance with shopping, meals, etc. For more troubling needs, there is a trained group of about fourteen lay ministers that work closely with the minister.

Board of Trustees

The board is a caring and engaged group of members who take their role seriously and who embraced the assessment visit originally requested by the annual budget drive volunteers.

Social Justice and Outreach

Members of this committee report a very active and diverse program with many opportunities. One that enjoys significant support is Peninsula Interfaith Action (PIA) through which the fellowship has befriended a school with students that primarily speak Spanish as a first language and a high rate of free and reduced fee lunch families. Members are also involved in a lobbying effort for policy changes, a monthly collection for a non profit cause, and volunteer opportunities in which whole families can participate. Some reported that there are many opportunities to be involved but no clear primary cause or effort. Newer members said it can be overwhelming to find just one place to jump in. Members of the committee noted that some of the work they do with PIA is noted as a PIA project and is not associated with UUFRC.



Facilities and Grounds

The fellowship is located in a residential neighborhood on a corner lot with only on-street parking. The lot is built out to maximum capacity. There is a preschool that rents space and that makes improvements to the spaces. With the help of fellowship members the preschool installed a play area on the back of the building that is also used by the RE children. There are a few members of the preschool staff that are also fellowship members. It is a long established and mutually respectful relationship.

UUFRC is enjoying steady growth meeting a real need for liberal religion in the area. The congregation enthusiastically welcomes newcomers and space is becoming a concern. In 2007, a Futures Committee met every two weeks for a year. Their main charge was to examine the most efficient and effective use of the building in different membership number scenarios including when they would have to add a second service, add staff and consider a capital campaign. The report concludes that the current building is built as far out and as far up as it can be. The committee looked at buying adjacent property to move offices or other program elements next door and learned that they would be required to add 40 off street parking spots.

The building was built in small sections that were added on to at various times. The fellowship continues to carve out small slivers for storage, office space, etc. The current church office is set off from any main entrance and hard to find. There are a lot of improvements and repairs needed to the kitchen, the room partitions, the roof and outside of the building. There have been some successful mini-campaigns in the past for individual needs that have successfully raised money by selling pieces of the project such as tiles or shingles. There are some small reserves to help offset costs but not enough to cover all.

Congregants mentioned during one of the workshops wanting to identify when they would either need to move to a larger facility or seed new congregations. It was also mentioned that for at least some, the primary goal is to grow new UUs however that happens best.

Discussions on possibilities for facilities and programs often begin with what can be done within limited resources rather than what is to be accomplished and how to gather/deploy the resources to make it happen.

Membership

The Membership coordinator and committee members have done an excellent job welcoming newcomers and inviting them to become members. They have everything from a system for contacting visitors to name badges with color coding. The color key is clearly posted on the name badge rack so visitors and members alike can see how often someone has been visiting or is a member. The congregation as a whole actively participates in seeking out and welcoming visitors. There is a facebook page and a sharing site on Go Go Verde where one can find recipes, referrals, etc.

There is a well thought out path to membership and includes a UU 101 class offered three times annually. New members are asked for a pledge commitment however the approach has been inconsistent. There is a newcomers circle meeting each month after services where information is shared and newcomers can meet each other and the membership coordinator. There is a well developed Welcoming packet that is separate



from the new member packet. Of note is the difficulty the consultant had finding the mission statement on the materials and on the website.

Newer members asked if there is a chart of where to go with questions, suggestions and ideas. A member of the board is designing an organizational chart to answer these questions. The website has a listing of activities and leaders as well as a calendar of events to help people to connect.

Planned Giving

As part of the outgrowth from the Futures Committee a planned giving program was developed. There is a brochure and handout available with the many ways to include UUFRC in the estate plans as well as a list of recommended financial counselors members can call on for further information. It can be a complex list of vehicles for those simply looking to mention the fellowship in their wills. There were some communications notifying congregants of the availability of materials but there was a decision not to make planned giving a primary focus at this time unless new leaders identified themselves.

The consultant asked about gift acceptance policies which exist and include the possibility of accepting tangible properties. There was consideration given to accepting only proceeds from the sale of property but it was determined not to limit the possibilities.

Annual Budget Drive

1. The annual budget drive employs ambassadors and a letter appeal with a brochure. The fair share giving guide has been used but the presentation of it could benefit from further understanding of how to use it and how to allow it to guide people’s decisions. Drive materials speak about average gifts and cost per person for various activities or dues. The budget is presented in both a program pie chart and a brief line item.
2. The annual budget drive and service auction are close together which causes competition for volunteers to complete the annual budget drive. While the annual budget drive is less sexy it is responsible for approximately seventy percent of the annual operating budget whereas the auction, which is more fun and easier to get volunteers, provides less than ten percent of the annual revenues. The ABD has typically been held after the auction in late April or early May resulting in a rushed budget setting process.
3. The 2011 ABD results are listed below:

Total Pledges: \$202,810
 Total Pledge units: 127
 Mean: \$ 1,597
 Median: \$ 1,200

Quartile	UUFRC	Ideal
1 st	7 %	10%
2 nd	11%	15%
3 rd	19%	35%
4 th	63%	40%



The quartile analysis determines how many households are contributing to twenty-five percent of the ABD total. In this case, eighteen percent of pledge units are currently contributing half of the ABD. This is dangerous because it means that the fellowship is overly dependent on a few people. If the top donor moved away, it would take a significant number of smaller contributions to make up the difference. The large number of pledge units in the fourth quartile is of concern because it requires fewer households to assume the greatest responsibility.

A distribution such as this can be reflective of economic realities for families. Sometimes it is an indicator of members that do not have a way to consider what is expected or needed from them. It can also reflect a number of members for whom their interaction with the fellowship is more transactional than transformational, i.e. they feel they are paying for RE and or a good worship experience but they do not feel their relationship with the fellowship plays a significant role in their daily lives.

The goal for assessing mean and median is to see how close they are; the closer in number the healthier the distribution between the upper and lower quartiles.



Below are results from other congregations for 2010.

Congregation	Donor Units	Ranked by Median levels -- better indicator of overall strength)		
		Total \$\$	Mean	Median
Los Alamos, NM	92	\$204,384	\$2,222	\$1,650
Somerset Hills, NJ	83	\$223,600	\$2,694	\$1,600
Reston, VA	126	\$244,400	\$1,940	\$1,500
Camp Springs, MD	85	\$160,000	\$1,882	\$1,470
Silver Spring, MD	211	\$425,800	\$2,018	\$1,300
Lubbock, TX	42	\$68,000	\$1,619	\$1,290
Oregon City, OR	117	\$221,200	\$1,891	\$1,200
NW Atlanta, GA	107	\$195,000	\$1,823	\$1,200
Woodinville, WA	97	\$171,500	\$1,768	\$1,200
Santee, CA	116	\$204,500	\$1,763	\$1,200
Grand Rapids, MI	68	\$118,400	\$1,742	\$1,200
Alexandria, VA	216	\$375,800	\$1,740	\$1,200
Huntsville, AL	77	\$133,000	\$1,729	\$1,200
Olympia, WA	218	\$358,600	\$1,645	\$1,200
Gwinnett, GA	67	\$110,200	\$1,645	\$1,200
Oak Ridge, TN	164	\$263,800	\$1,609	\$1,200
Col Spgs,CO-High P	105	\$164,400	\$1,566	\$1,200
Clemson, SC	87	\$134,400	\$1,545	\$1,040
Tuscaloosa, AL	46	\$76,200	\$1,656	\$1,010
Lexington,MA-FOLL	207	\$337,500	\$1,630	\$1,000
Carbondale, IL	121	\$173,200	\$1,431	\$960
E Greenwich,RI	137	\$176,200	\$1,279	\$903
Macon, GA	80	\$124,700	\$1,558	\$900
Kalamazoo, MI	195	\$257,615	\$1,321	\$900
Savannah, GA	105	\$158,900	\$1,514	\$900
Chattanooga, TN	98	\$138,150	\$1,410	\$900
Vancouver, WA	184	\$220,584	\$1,199	\$840
Flagstaff, AZ	95	\$123,855	\$1,303	\$750

Religious Education

1. The much appreciated DRE of seven years decided to pursue other ventures. She is described by many as a gift to the congregation. A search was conducted and the position was filled by Derby Davidson, a member who was already giving hundreds of hours to the RE program. News of Derby's appointment was enthusiastically received by the congregation.
2. The children's RE program recruits teachers for three eight-week assignments for each grade level. The year is kicking off with all slots filled and the DRE is excited about the year ahead. The greatest challenge now is with the middle and high school youth. There is a small group that attend and the most difficult to



attract and retain are the teen boys. Attendance of all age groups is sporadic and small turn out is frustrating for the volunteer teachers. Attendance is very high in the fall (upwards of 90 children) and drops to as low as 25 children in the spring. The DRE points to conflicts such as sports and parents who “shop” the sermon before determining if they will come each week.

3. The consultant had a chance to share a donut with some of the middle and high school youth who shared some of their experiences. OWL and several other activities are hosted with three other smaller UU congregations. The teens report this to be a highlight and look forward to opportunities to meet up. Many youth shared that one of their favorite memories and activities happen at the annual family retreat. They expressed great joy being with other families from within the congregation. This is clearly a meaningful youth ministry.

RECOMMENDATIONS

Please post this report on the UUFRC website, have paper copies available and encourage all congregants to read it. This will help foster conversations and give everyone a common understanding of why certain actions are being discussed and considered.

Ministry

1. Julia has been a very effective leader and caring minister for UUFRC. It is assumed that upon Julia’s retirement in four years, the fellowship will enter a one to two year search process. If there is thought of a capital campaign, consideration should also be given to the costs and timing of a search process.

Social Justice and Outreach

1. There are so many choices for congregants to participate in that the impact of the social justice work is hard to measure. The congregation may want to consider what their top priorities are and how and in what areas they want to focus to make a positive difference in the world.

Facilities and Building

1. The building continues to be slivered to meet growing needs for office and storage. With the growing number of projects that will need additional funding from the congregation the fellowship is encouraged to look at the possibility of a capital projects campaign rather than a series of discrete asks to the congregants. This will allow for a focused, well thought out plan and presentation and avoid the risk of congregants feeling like they are always being asked to give more.
2. A congregational vision will help determine how best to use the existing building as you look ahead. Keeping in mind that a facility is only one tool in meeting a vision yet one that must be ready to meet future demands.

Planned Giving

1. It is a good time for the board to propose a use for gifts from estates or other planned vehicles before there are gifts to consider. Since these gifts are not considered in annual revenue projections, it is a healthy practice to designate



these revenues to a special fund to assist with projects or one time needs outside of ongoing operations. Things like endowment, capital needs, minister interns, etc., are examples of such purposes unless otherwise designated by the donor. In this case, the board has the responsibility to ensure that the designation is consistent with the fellowship's mission before accepting.

Annual Budget Drive

1. The ABD model used is a smattering of all good practices however they could benefit from some additional training in how to use the fair share giving guide more effectively and effective stewardship conversations. Engaging a stewardship consultant to help design the campaign, schedule activities and provide a workshop for ambassadors may yield greater results. A quote for this consulting is below.
2. The ABD is strong and yet represents only seventy percent of the total operating income. A healthy ratio is eighty percent. It is recommended that UUFRC consider ways to close that gap over the next several years, especially if there is a capital campaign in the offing. More fully utilizing the fair share giving guide will help move the congregation individually and collectively toward this goal.

A strong showing in the annual budget drive will also give the fellowship a demonstrated track record if it is determined to have a capital campaign and/or a special campaign for calling a new minister.

3. Congregations that experience healthy annual budget drives have a culture of generosity in all things. This culture is intentional and is built into stewardship of programs, facilities and the annual budget drive. Generosity comes from the hearts of individuals when they are transformed by their association with the fellowship. There are many ways to build this in to the daily activities and overarching plans. Sharing the role of stewardship with all members, committees and activities will be reflected in the ABD results. *Beyond Fundraising* by Wayne Clark has some ideas on how to take a more holistic look at stewardship in chapter 7, *Forward Through the Ages (FORTH)*. It is available through the UUA bookstore and sells for \$18.

The consultant highly recommends the book *The Soul of Money: Transforming Your Relationship with Money and Life* by Lynne Twist. The leadership, C-Groups or the whole congregation may wish to read the book or select chapters and share their reflections. The overall message is that our values inform our spending and if others want to see what we value, our check register will tell an awful lot. It is truly inspirational and causes one to rethink their relationship with money and generosity. Individual and church budgets will be transformed in tandem.

4. Eliminating competition for volunteers with the auction may help lessen the work of the ABD volunteers and allow the ambassadors to begin in February. An earlier start to the ABD will allow the board more time to prepare the budget. To do so would require moving the auction to the fall, a move to be carefully considered since it would impact the operating budget. Moving would mean either having two auctions in six months (not likely to be effective) or not having



an auction for 18 months leaving a possible gap in the operating budget for one year or creating the need for a smaller fundraising effort to fill the gap.

It would be ideal if the auction did not fund the operating budget but could instead fund social justice projects, capital improvements, or other special project.

Religious Education

1. In order to encourage and retain teens to become more involved in the youth group and life of the fellowship, it was recommended that Derby work with the district office and other UU congregations to discover successful strategies. Teens reported to the consultant that they look forward to meeting with other UU congregations and engage in activities with a larger group.
2. It was noted that RE programs are most successful when parents attend regularly. RE could benefit from other areas of the fellowship such as sermons and C-Groups reminding parents that their regular attendance is important to their children and that life in the fellowship is richest when everyone shows regardless of the day's sermon or personal needs for ministry.
3. As familiar as Derby is with the RE program and the congregation with Derby, there will be a transition period for both. It will be important that Derby receive support as he moves into his role, makes changes and gains perspective.

Strategic Planning

1. Many conversations with various committees began with what can be accomplished with limited resources. A more robust conversation would be "what are we trying to accomplish" followed by "what do we need to do so." A plan without a shared vision is a wish list. A plan driven by a shared vision is a priority list. Congregations are encouraged to consider a strategic planning process every five years. UUFRC's last strategic plan of record was done in 2002 when Julia arrived. It is a fair estimate that at least half of the congregation is new since the last plan was developed and has little or no buy in or resonance with it.
2. Entering into a strategic planning process now would help prepare for and address a wide variety of issues from Julia's upcoming retirement, to a search for a new minister, to answering the many questions about how to best utilize space and volunteer resources. It is recommended that UUFRC begin a strategic planning process as soon as possible. Defined below are the outcomes from the process. Preparing the fellowship to answer the necessary questions requires advance preparation including opportunities in worship, C-Groups and committee work to reflect on the importance of the fellowship in one's individual lives on a daily basis.
3. Outlined in *Beyond Fundraising*, Chapter 3, Searching For the Future is a workshop that culminates in the congregation writing their vision and mission statements and identifying the top priorities in each area of UUFRC's life. From there the board and committees will give shape to the priorities by allocating



resources and estimating when each can be accomplished and in what increments.

Outcomes from the Searching For the Future are vision and mission statements and an earnest start on a strategic plan. Below are the definitions used in this process.

Vision statements answer the question “Why”. Looking back five years from now, why is the world, community, congregation better because UUFRC is here? A vision statement gives purpose, direction and inspiration to the shared possibilities.

Mission answers the question “What.” What is UUFRC today? A mission statement is short, memorable and shares just enough of your values to attract those who share them and want to know more.

Strategic Plan answers the question “How.” How is UUFRC going to fulfill its vision and honor its mission over the next five years? It addresses the five main areas of congregational life: Worship and Music, Congregation from Within, Lifespan Religious Education, Social Justice Outreach to the Community and the Wider Religious Community.

Conclusion

Overall, the consultant found UUFRC to be a healthy, thriving and indeed growing congregation. There are no crises, members are participating in church life and they are at the perfect place to begin to discuss what the future holds.

It has been an honor to work with UUFRC's leadership and to hear from so many congregants anxious to grow their participation in the life of the fellowship.

In faith,

A handwritten signature in cursive script that reads "Mary Gleason".

Mary Gleason
UUA Stewardship Consultant

Cc: Wayne Clark, Director of UUA Congregational Stewardship Services
Cilla Raughley, Pacific Central District Executive



1. Reference Materials

Books:

Beyond Fundraising: A Complete Guide to Congregational Stewardship by Dr. Wayne Clark. 2007

www.uua.org/bookstore

Raising the Roof by Alice Mann. 2001

The Soul of Money: Transforming Your Relationship with Money and Life by Lynn Twist. 2003

Listserves on the UUA website:

UU Leaders
UU Money

2. Estimate for Searching For the Future Workshop:

The per diem rate is set by the UUA in accordance with the size of the congregation. This estimate includes preparation time and approximately two days on site. Our goal is to keep the congregation's costs to a minimum while providing professional and meaningful consultation. UUFRC will be billed only for the actual number of hours used. If, for any reason, this service should require hours in addition to this estimate there will be no further charges to UUFRC. All travel costs such as air fare and accommodations are included in the per diem rate.

3-5 days (8 hours/day) at \$1320/day = \$3960-6600 plus up to six hours of travel time (\$990 maximum).

3. Estimate for Annual Budget Drive Consulting:

All considerations for per diem rate and goals are the same as listed above. Likewise, UUFRC would be for actual time used.

1.5 day (8 hours/day) of advance preparation time with the ABD via phone and e mail including schedule of activities, campaign materials, recruitment of visiting stewards, setting priorities for individual calls and programming for all ABD events.

1-2 days of on site workshops for visiting stewards. Actual use would depend on the number of visiting steward workshops.

2.5-3.5 days (8 hours/day) at \$1320/day = \$3300 - \$4620 plus up to six hours of travel time (\$990 maximum)