



## Next Steps Weekend Report

### for the Unitarian Universalist Church of the Palouse in Moscow, ID

## RESEARCH & OBSERVATIONS

### I. Summary

The Unitarian Universalist Church of the Palouse in Moscow ID engaged me, Rachel Maxwell, a Unitarian Universalist Stewardship Consultant and member of the Stewardship for Us team, to conduct a *Next Steps Weekend* to assess readiness for a capital campaign and to prepare this report for consideration by the congregation. This *Next Steps Weekend*, conducted from October 5 to 7, 2018, engaged me to provide an independent, professional opinion on recommended next steps with the goal of an eventual capital campaign in support of more Sanctuary space, more Friendship Hall space, more RE Classroom space and accessibility everywhere.

### II. Basic Data on the Congregation

Name and Mailing Address of Congregation	Unitarian Universalist Church of the Palouse 420 East Second St. Moscow, ID 83843 (208) 882-4328
Website Address	<a href="https://palouseuu.org/">https://palouseuu.org/</a>
Minister	Rev. Elizabeth Stevens
Lay Leader Point of Contact	Joe Pallen, Board President
Number of Members	174
Annual Financial Commitments for 2018-19	\$234,354
Average Household Financial Commitment	\$1,953 from 120 households
Median Household Financial Commitment	\$930
Current Operating Budget	\$284,286
Endowment	~190,000
Most Recent Approach to Annual Budget Drive	"Community Census Taker" visiting program, mailing and phone contact
Most Recent Capital Campaign	Haven't had a capital campaign since the building was purchased and renovated in the 1980s. Even then it was not formally conducted.
Average attendance	127 / 64 for RE



### III. Objectives and Scope of the Next Steps Weekend

The purpose of a Next Steps Weekend is to provide your congregation with an objective eye to identify strengths, opportunities, and areas needing improvement in light of the congregation's stated goal of a building project as it relates to your mission, vision and programs.

Prior to the on-site visit, I received and reviewed substantial material, including information on:

- finances,
- membership,
- programs,
- annual giving,
- past capital campaigns,
- staffing,
- congregational history,
- by-laws,
- annual reports,
- newsletters, and
- your website.

I also had email exchanges and/or telephone conversations in advance of the visit with:

- Rev. Elizabeth Stevens, Minister
- Summer Stevens, Administrative Secretary
- Joe Pallen, Board President
- Rev. Tandi Rogers, Pacific Western Region Primary Contact for UUCP

### IV. Initial Impressions, Commendations and Observations

Prior to my visit, through the information gathered through conversations and documentation, I was anticipating meeting a strong, healthy congregation. And I was not disappointed. It was a delight to be among the people of a strong, vibrant, congregation.

Before I arrived I also absorbed the work of the Facilities Task Force. I read their final report as well as the descriptions of possibilities to meet your goals of expanding space for worship, fellowship and religious exploration as well as create more inclusive spaces by making them accessible to all.

While on site, I met with your Minister, Executive Committee, Board of Trustees, Staff and various church committees to gather information in person about your congregation and its programs and to provide information about capital campaigns and next steps for moving forward. I met with approximately thirty of your staff and leaders over the course of the weekend.

My findings are summarized in the following outline and detailed further in the remainder of the report.

See Appendix A for the *Next Steps Weekend* Schedule.



### **A. Commendations**

- You have a wonderful Minister and a strong trusting relationship with her.
- You are a grounded, committed, sustainable, visionary congregation.
- You have an innovative Director of Family Ministries and a strong program for children.
- You are a home for progressive liberal values in the center of a conservative town in a more conservative state.

### **B. Observations**

- You don't have enough space -- in Sanctuary, in RE, or for meetings.
- You don't have a commercial kitchen.
- You have issues with heating and electricity in the Yellow House.
- RE is not accessible and accessibility to the Sanctuary and Fellowship Hall are not ideal.
- You could improve on your comfort level with conversations about money.

### **A. Commendations**

#### You have a wonderful Minister and a strong trusting relationship with her.

You called Reverend Elizabeth Stevens in 2012 and your ministry together is powerful. She is committed to social justice and calls you to be your best selves. You respond with enthusiastic commitment, strong Sunday morning attendance, and lots of caring work on committees and programs. You are making your vision manifest together and it makes sense that would include more space to change by throwing your doors open more widely.

#### You are a grounded, committed, sustainable, visionary congregation.

Your congregation has "been around the block" and your longtime leaders have learned from the past and are committed to making a solid future in a changing world. Your people spoke to me about their experiences in the past with a clear view toward the future. I consistently ran into long time members and leaders who were open to new ideas, and willing to share learnings from their past experiences. You have younger members working with older members on your Board of Trustees and Executive Committee and they are listening to each other. This is not always the case. Your strength is grounded in this ability to think about what might work, to learn from the past, to hold strong visions of the future, and to courageously move forward.

You have a strong shared understanding that you need more space and improved facilities to live out your mission and vision. See APPENDIX B for survey results.

#### You have an innovative Director of Family Ministries and a strong program for children.



Your leadership in family ministries is impressively grounded in the mission of the congregation. Despite housing RE in an entirely different building you do not seem to have the “upstairs / downstairs” issue present in many congregations. That is when the RE and the work and activities of the rest of the congregation seem very disconnected. Instead your leadership, both professional and lay leadership, clearly view the ministry of Religious Education as a part of the full ministry of the church. The deep connection your Director of Family Ministries has with your congregation is a gift. You have successfully navigated the sometimes-difficult waters of a member or past member becoming staff. And you appear to be reaping the best of rewards.

### You are a home for progressive liberal values in the center of a conservative town in a more conservative state.

Your part of the world knows you and knows they can rely on you to open your doors without judgement when people need sanctuary. Your role in the Palouse is an important one. You express the core values of Unitarian Universalism by responding to events with universal love and providing sanctuary without judgement. I think the statement by Marisa Gibler during my meeting with the Board of Trustees and Executive Committee stated your shared mission well. She said she didn't think “growing” was quite the reason why you are interested in building more space. Instead, she said, you wanted to increase and improve your spaces in order to be “radically welcoming.”

## **B. Observations**

### You don't have enough space—in the Sanctuary, in RE, or for meetings.

I heard from your leaders over and over again that there wasn't enough space. I observed myself on Sunday morning that, for a shy person walking in, not wanting to sit next to someone else, there wasn't room. It was clear there wasn't room for more kids in the Yellow House, and the scheduling of meetings I was told, could be so tight that you wouldn't be able to accommodate a group that needed it. If you want to be radically welcoming, you need to have the space for the people who show up.

### You don't have a commercial kitchen.

Having a commercial kitchen isn't heavily emphasized in your plan, but it is included, and is deeply important to your mission of radical hospitality. A commercial kitchen makes it possible for you to have people from the outside come in and be fed. And there is more you can do with a commercial kitchen than you are currently imagining.

### You have issues with heating and electricity in the Yellow House.

While the Yellow House may have been much beloved, right now it is impeding your progress. Its heat and electricity are unreliable or simply not working. It has no wheelchair access and stops folks with mobility issues due to difficult stairs and spaces. You need RE spaces that can accommodate all students and teachers. And you need



room to grow your wonderful programs. If it's too crowded or too difficult families will not come back.

### RE is not accessible, and accessibility to the Sanctuary and Fellowship Hall are not ideal.

Accessibility is an issue for you in general. While you have a good ramp for the Sanctuary and wheelchair access to the Fellowship Hall, it is not easy to go from one to the other. Even kids say so! And the RE spaces in the Yellow House are not accessible at all. It is impossible to access the rooms there in a wheelchair.

### You could improve on your comfort level with conversations about money.

You are a healthy congregation in so many ways, and while not being very comfortable with asking for money isn't the worst thing, your level of avoidance of the conversation needs to change in order for you to fully live out your mission. Money is culturally more difficult to discuss than other, seemingly more private things, so you are not alone. Breaking the taboo of discussing money is missional. Open conversations about how much the congregation needs to fulfill its mission, and that the congregation, the membership, is all there is that finances that mission, are deeply important. Without the members contributing their financial resources, the congregation does not exist. Funding the congregation is funding the world you want to live in. We must not be afraid of each other's wealth or lack of wealth. We accept each other as we are and when we are each generous, to a place where we notice our generosity, that is good. It's not only a gift to the church, it is a gift to ourselves and our future.

## **IV. RECOMMENDATIONS**

### **1) Map out a 5-year strategic financial forecast.**

A five-year financial plan is a great way to see how your building project fits within the overall finances of the church. If you decide that a loan is a necessary part of your building plan, a lender will probably require such a thing. Your Finance team was keen to make such a plan. They know that a realistic financial plan is key to understanding how to move forward successfully. I've included a sample spreadsheet for strategic financial forecasting with this report.

To help with the plan, the rule of thumb on how much you may be able to raise for a capital campaign is three to five times your annual giving of \$235,000, which is approximately \$700,000 to \$1,100,000. You will need at least one anchor gift that equals 15% to 20% of the campaign total to reach the bottom end of that range and hopefully two or three of that size. Gifts usually come from assets or savings. Many people will pay their capital pledges over a three-year period and, often, around half of the pledge total comes in in the first year of the campaign. These general guidelines apply when you obtain congregational consensus, your



congregation is financially healthy, has minimal conflict and you plan your building campaign well.

2) Improve your annual giving and talk about money.

It may be helpful for you to use the chart below to share with the congregation during your annual giving this year. It shows not only how many households make up each quartile of giving, but also the range of annual pledges in each quartile. You might set a goal of having your top three quartiles reflect 35% to 40% of your giving rather than the 28% it reflects now. Showing folks the chart can be a great ice-breaker. I recommend you focus on moving people up from the bottom quartile. While there are undoubtedly folks who are giving fair share there – it is generally the quartile that contains the most people who are not yet giving to their capacity. Remember that giving money to their church community can bring more joy and contentment to those who give. Funding our church community is an opportunity for us to fund the world we want to live in!

Each 25% = ~ \$59,000	# of UUCP Households	% of Households
<b>First 25% of total giving</b>	<b>5</b>	<b>4%</b>
Annual Giving Range:	Upper: Lower:	\$15,000 \$9,000
<b>Second 25%</b>	<b>9</b>	<b>7%</b>
Annual Giving Range:	Upper: Lower:	\$8,100 \$5,000
<b>Third 25%</b>	<b>21</b>	<b>17%</b>
Annual Giving Range:	Upper: Lower:	\$4,800 \$2,000
<b>Fourth 25%</b>	<b>92</b>	<b>72%</b>
Annual Giving Range:	Upper: Lower:	\$1,800 \$30

3) Suggested Timeline for Capital Campaign

You show all signs of readiness for a capital campaign to make your spaces align more fully with your mission.

**Fall/Winter 2018:**

- 1) *Official Congregational Vote up or down – do we stay or go.*
- 2) *Create and recruit a Building Project Steering Committee:*



*This is a large and ambitious project and will require folks dedicated to its vision and willing to work on the steering committee for several years. Here are some suggestions for roles on the committee:*

- a. Chairperson – Primary leader who holds the vision--needs strong recruiting and delegating skills!*
  - b. Strategic planning lead*
  - c. Building plan and construction subcommittee Chair*
  - d. Furnishings /aesthetics subcommittee Chair*
  - e. Communications/Publicity subcommittee Chair*
  - f. Finance lead*
  - g. Capital campaign Co Chairs*
- 3) Create and recruit a Capital Campaign Committee:*
- a. Capital Campaign Co Chairs (serve on Building Steering Committee)*
  - b. Leadership gift Chair*
  - c. Launch event Chair*
  - d. General gifts Chair*
  - e. Publications/communications/publicity*
  - f. Follow up Chair*
  - g. Treasurer/Financial Monitoring*
  - h. Administrative support*
- 4) Create a special Capital Campaign holding account*

*NOTE: I recommend the creation of such an account at this early period in your campaign timeline so that people who would like to contribute in Tax Year 2018 can make contributions and these will not be mixed with your general building funds. Also note that contributions of Stocks and Securities can be transferred directly to the church; in this way the donor is not subject to being taxed on the capital gains.*


**Winter 2018/2019:**

- 5) *Create strategic financial projections and plan for building, campaign, staffing, programs.*
- 6) *Recruit Architect and contractor to make current financially feasible building plan option(s) for you.*
- 7) *Continue work with architect and contractor on projections and planning. Get drawings and maybe a model.*
- 8) *Educate and discuss new plans with the congregation. Solicit input.*
- 9) *Schedule and plan for Financial Feasibility Study. **Spring / Summer 2019***
- 10) *Financial Feasibility Study based on plan (if not already conducted)*
- 11) *Congregation votes on proposed final building plan and to proceed ahead*

*NOTE: You could hold off on this vote until Rev. Elizabeth's return. It could be an opportunity for celebration!*

- 12) *Recruit and train stewards for Capital campaign.*

**Summer / Fall 2019 (after Rev. Elizabeth returns)**

- 13) *Quiet / leadership phase of campaign.*

**Fall 2019**

- 14) *Launch Event for Campaign – time for a party!*
- 15) *Conduct face to face combined Annual Budget and Capital Campaign.*

Please note that the proposed timeline has an aggressive schedule to complete each step. As long as you keep the congregation informed about the ongoing progress being made toward your goals, you will maintain momentum. Careful and inclusive planning are key to the congregational trust and support you already enjoy. It is this care that will support your vision emotionally, intellectually and financially all along the way!



In summary, you are a remarkable, vibrant, strong, caring and care-full congregation. You are ready to do the hard work of conducting a capital campaign to create a built environment that will better support your mission and vision.

Please let me know if you have questions about anything in this report. It was a pleasure to be among you! I am grateful for the chance to help by providing my reflections and recommendations on your challenges and opportunities for they are beautiful! I look forward to working with you as you proceed on this journey.

With gratitude for all you do.

Kind regards,

Rachel Maxwell

Stewardship Consultant, Stewardship for Us

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## APPENDIX A

**Next Steps Weekend Schedule  
for Unitarian Universalist Church of the Palouse, Moscow ID**

**October 5 to 7, 2018**

<b>Friday, Month &amp; Day, Year</b>	
5:00 PM	Individual meeting with Rev. Elizabeth Stevens
6:00 PM – 8PM	EC Committee, Minister and Board of Trustees – Potluck meeting
<b>Saturday, Month &amp; Day, Year</b>	
8:30 AM	Tour of building & grounds
9:00 AM	Meeting with Building Task Force
10:00 AM	Meeting with Ministry
11:00 AM	Meeting with Stewardship
12:00 PM	Lunch break
1:00 PM	Meeting with Finance Committee
3:00 PM	Meeting with Staff
4:00 PM	Meeting with Membership Committee – <i>not Confirmed – no Childcare</i>
<b>Sunday, Month &amp; Day, Year</b>	
10:00 AM	Sunday Service
11:45 AM	<u>Snacks/lunch</u> , which can continue during the following presentation ( <i>snacks downstairs</i> )
12:00 PM	Presentation of info & recommendations to Congregation with Q&A
12:45 PM	Wrap-up Meeting with Board, Minister and others as desired (optional)
1:30 PM	Depart

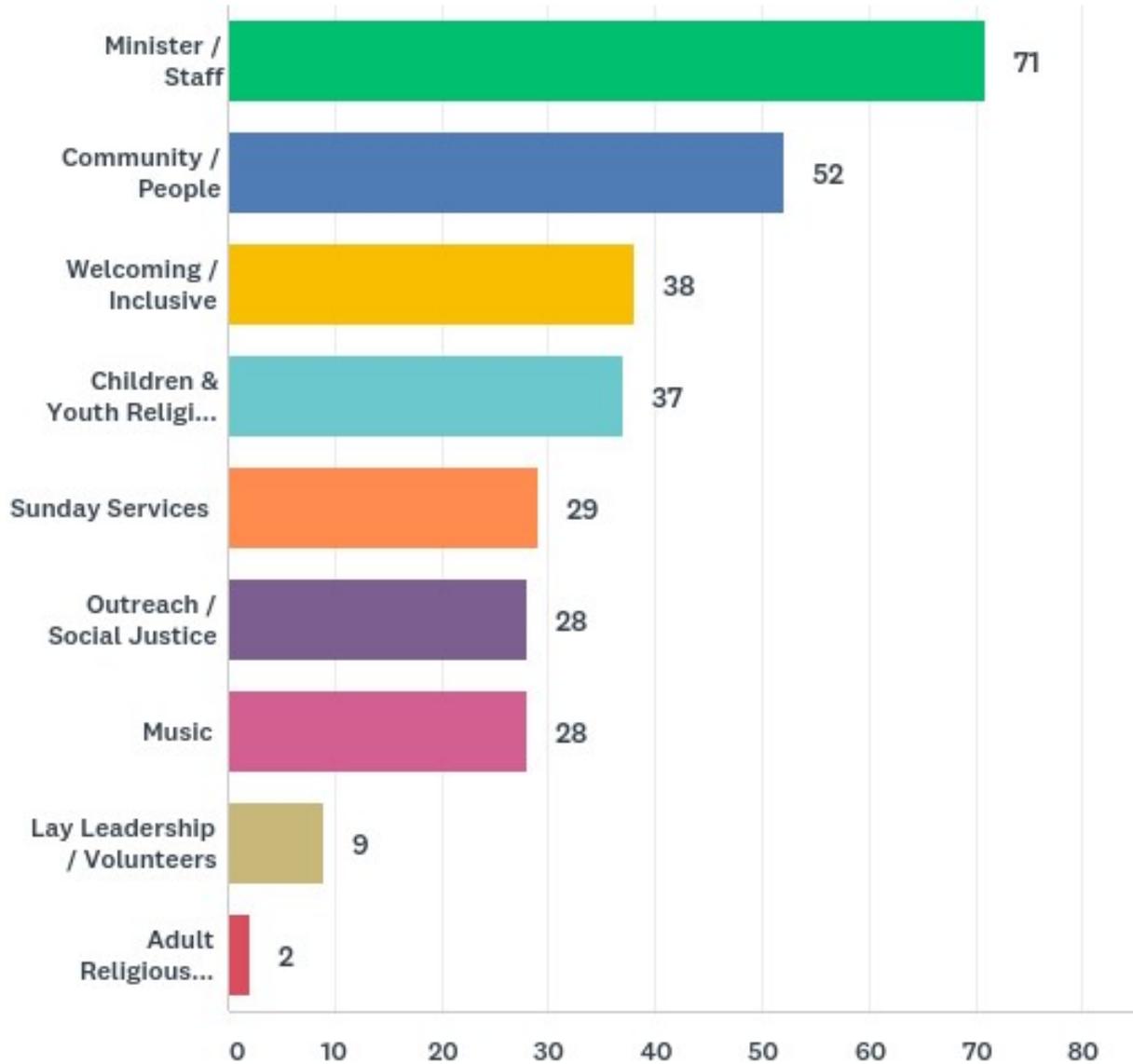
## APPENDIX B

**Results of Written Surveys**

Ninety-eight surveys were completed by members and friends of the Unitarian Universalist Church of the Palouse prior to the Next Steps Weekend.

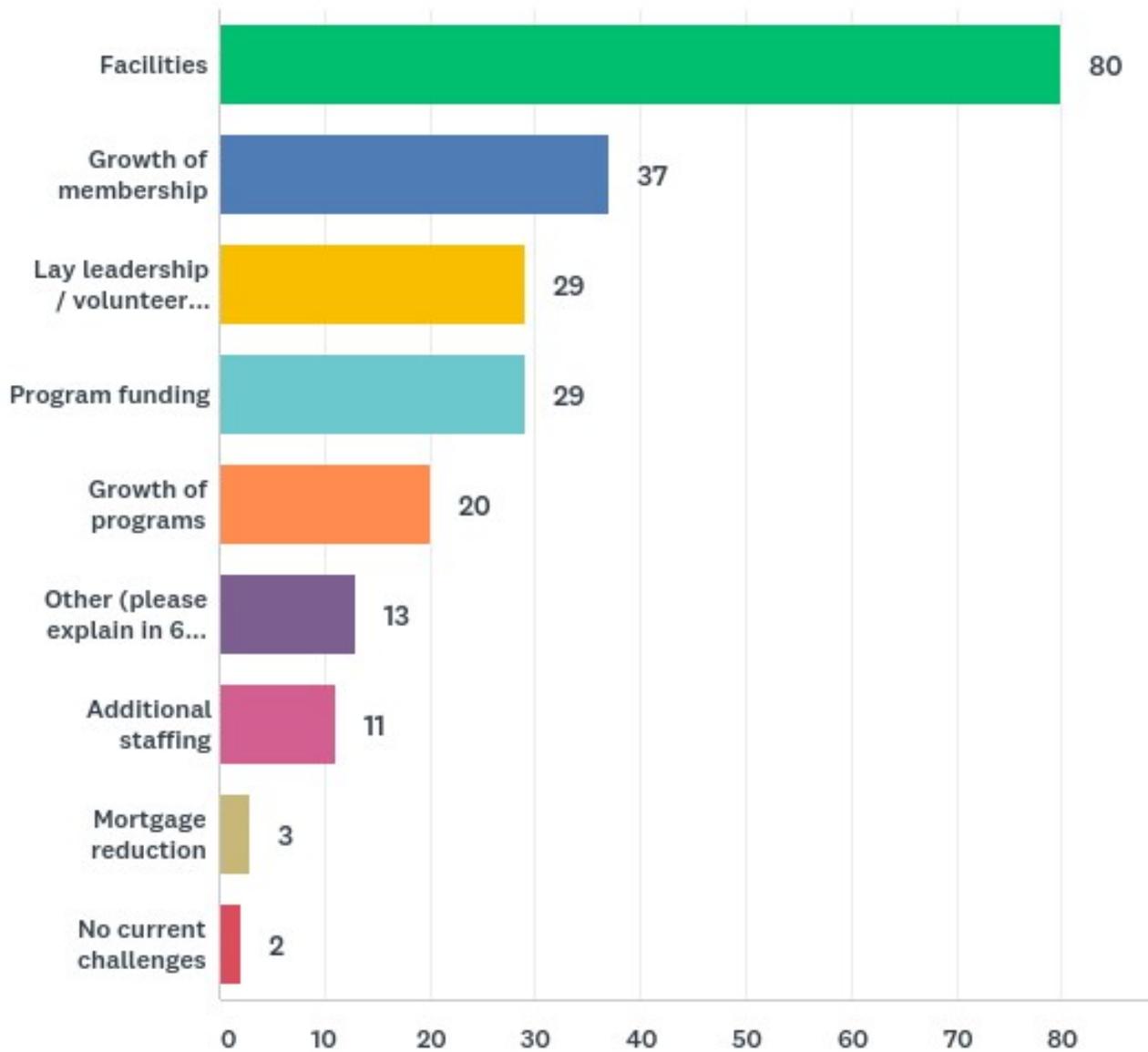


**Q1 What are the 3 greatest strengths of Unitarian Universalist Church of the Palouse?**





**Q2 Are there any challenges UUCP needs to address in the next five years?**

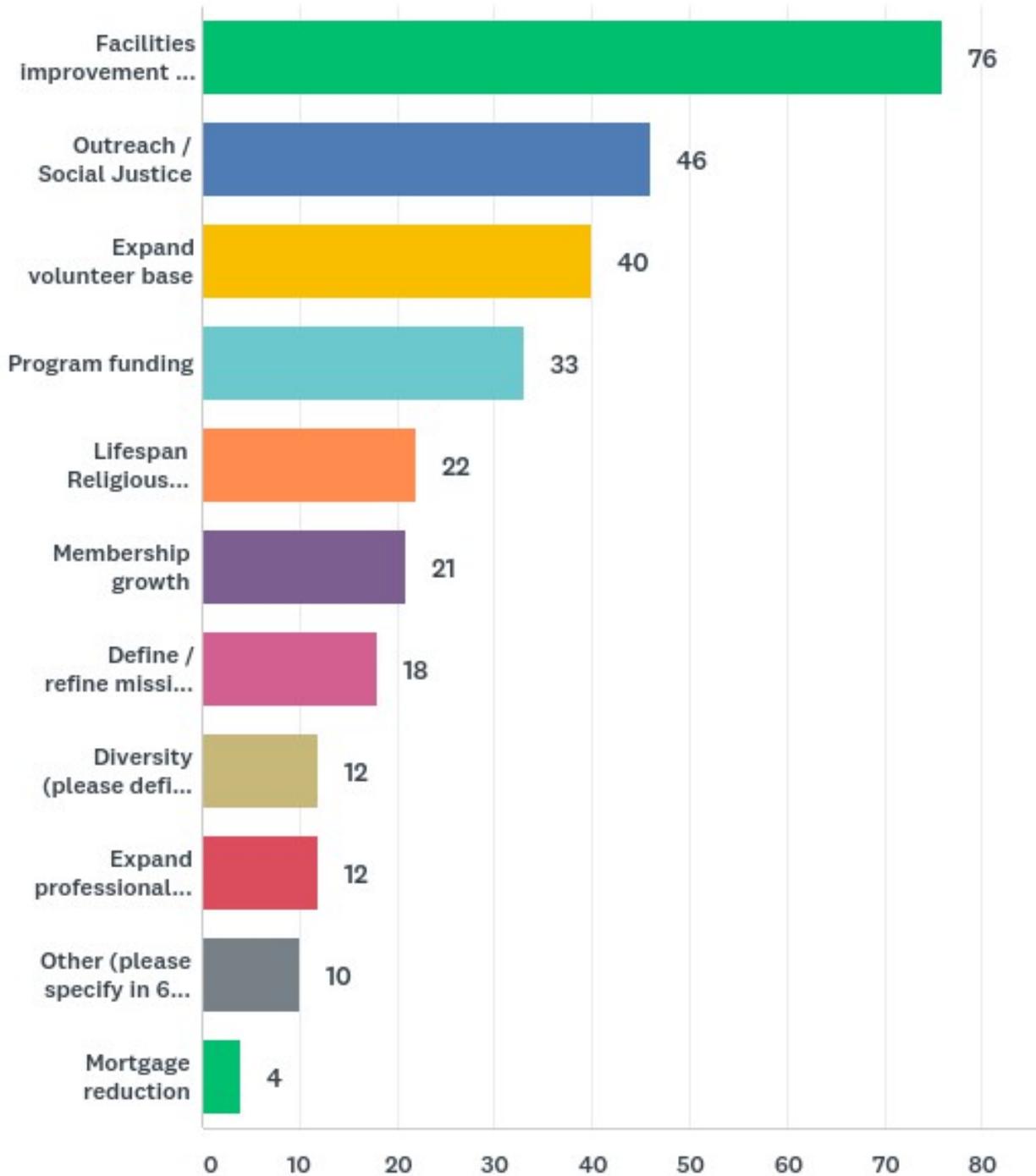


13 “Other” Responses included:

- 4 indicating various facilities challenges
- 4 indicating financial and budgeting challenges
- 2 indicating challenges with the external political environment
- 1 indicating you are challenged with expansion of your diversity
- 2 saying they don’t see other challenges

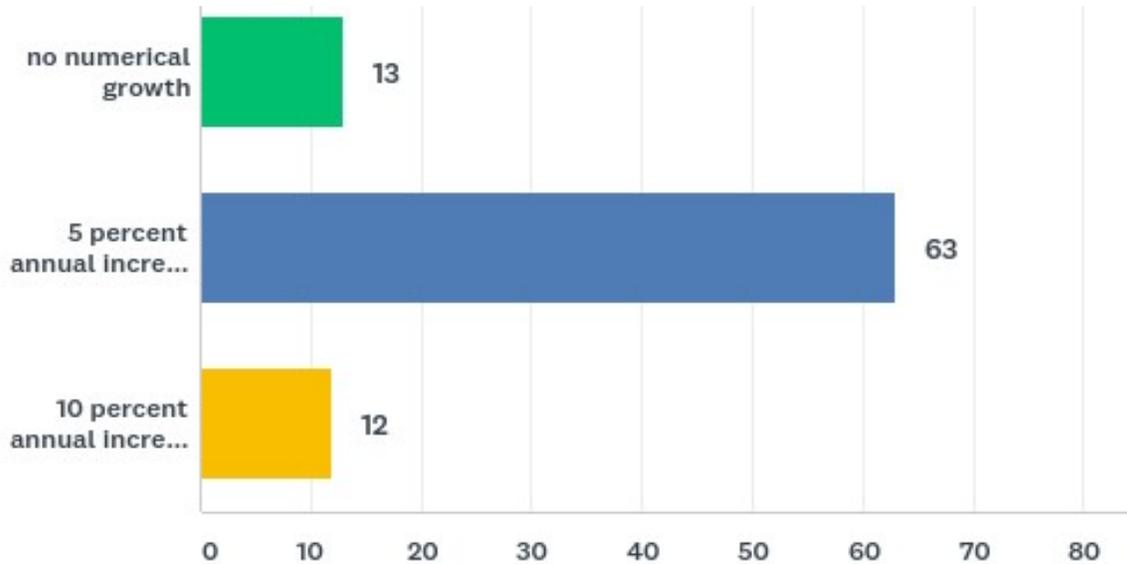


**Q3 What are the 3 top priorities for UUCP to further our mission going forward?**



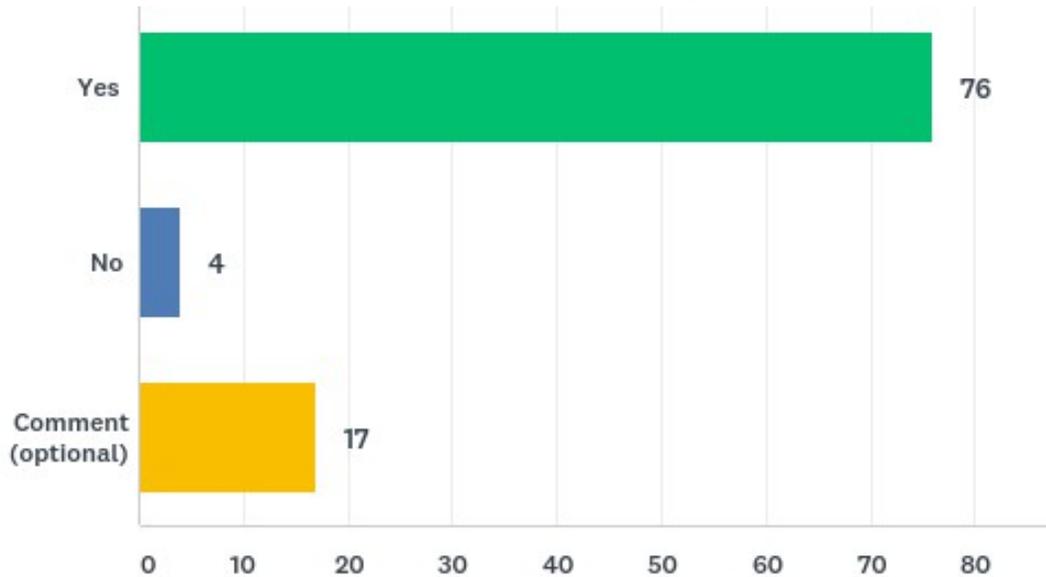


**Q4 Over the next five years, I would like to see our membership experience the following annual growth rate:**



Note that it is unusual and sometimes unhealthy for a congregation to experience higher than 5% growth per year for a sustained period. Please keep this in mind when forecasting growth on your strategic financial/resource planning worksheet.

**Q5 If a Capital Campaign is held to further the mission of UUCP and to fund building and renovations for the congregation’s facilities, and pledges can be paid over the course of 3 years, would you contribute to a future Capital Campaign?**



In comments:

2 indicated they had reservations about a campaign for various reasons

14 indicated they support the campaign but were worried about their own financial capacity

1 said they would like to contribute \$10,000 or more!