

**ASSESSMENT VISIT REPORT**  
**Unitarian Universalist Church of Southeastern Arizona**  
**July 11-13, 2008**

**Congregation:** UUCSEA  
Sierra Vista, AZ

**Minister:** Rev. Rod Richards

**Contact Person:** Sharon Covey, President, Board of Trustees

**Mission** To create a welcoming community of caring people where all receive emotional support, intellectual stimulation, and respect for their individual spiritual paths; to work for justice and equality in our community and the world; to increase respect for the natural environment; and to promote the principles of Unitarian Universalism.

**CURRENT STATISTICS/METRICS**

Year Founded:	1996
Number of Members:	83 members
Number RE Enrollment:	6
Annual Pledge Income (2008):	\$109,938
Number of Pledge Units (2008):	54
Average Pledge (2008):	\$2,035
Median Pledge (2008):	\$1,325
Annual Budget (2008):	\$ 134,722
Debt:	\$0
Fund Balances as of June 30, 2008:	
Building Fund	\$20,000
Operating Fund	\$60,813
Other Designated Funds	There are three donor restricted funds
	Polly Packard Fund
	Pinteck Fund,
	Building Fund
	The total for these three funds is \$24,827.
Average Worship Attendance (adults):	80%
Average RE Attendance:	3-4

**Purpose of the Visit**

## Unitarian Universalist Association Congregational Stewardship Services

UUCSEA was founded in 1996. The congregation grew to about 60 members where it remained until about three years ago. Five years ago Reverend Rod Richards was hired to be a part time minister and he commuted to Sierra Vista from Tucson for services twice a month. Approximately two years ago the congregation called this same minister to be their full time minister. This is Reverend Richards' first church. The church has grown to approximately 90 members over the last three years due in large part to the minister's inspiring and relevant sermons and services.

In the twelve years that UUCSEA has been in existence, they have had nine different locations. The congregation is an elderly one with an average age of 72. Last year, nine members either moved or passed away, a full ten percent of the membership. The congregation and the board are aware that if they are to remain a liberal religious presence in Sierra Vista, they must address the ongoing questions of growth and the possibility of a permanent home. The UUCSEA board of trustees contacted the UUA Congregational Stewardship Services office to conduct an assessment visit in preparation for the work ahead.

Many thanks to Sharon and Jerry Covey and Phyllis Prickett who opened their homes for this visit and for their willingness to share so generously of their knowledge. Thanks to those who transported the consultant in their cars and to Reverend Rod Richards who cleared his calendar to attend all meetings. The consultant was delighted to see the time dedicated to this visit by the whole board. Your preparations and openness made the process easy and enjoyable.

### **FINDINGS AND OBSERVATIONS**

#### **Strengths of UUCSEA**

UUCSEA congregants are very caring and attentive toward one another. They have established Caring Teams where each member of the congregation is assigned to a team member. The Caring Teams also assist in communicating vital information to their assigned group.

The annual budget has grown from \$25,000 to \$100,000+ over the last five years. This is a very positive sign of the congregation's commitment to the church and to their shared goals.

Services are held in an elementary school multipurpose room every Sunday morning. This is the ninth location in twelve years for the congregation. With fifty percent growth the congregation and the desire to attract young families, the time to look ahead to a permanent home has arrived.

The current board began its term on July 1. The members have the necessary energy, passion and leadership skills to lead the congregation through a series of important decisions about its future.

Church history is not formally documented but because the church is so young creating one will not be difficult.

### **Vision, Mission and Strategic Plan**

1. A vision statement answers the question “Why do we exist?” A congregational vision is a picture of a preferred reality that captures the overriding essence of a faith community. Based on a figurative photograph of the past and a mental snapshot of the present, a congregational vision identifies how the church will be different/better in the future. It is the lens through which reality is viewed. Vision is the imagination that gives inspiration and direction to a congregation. A rule of thumb in planning is that a group will never be greater than its vision.

UUCSEA has engaged in discussions about their vision yet still do not have a cohesive vision. This is evident in the lack of a shared desire to build and grow. A vision statement would clarify goals and next steps in many areas.

### **Board of Trustees**

1. There is a new board in place as of July 1. The board members have the energy and skills to ably lead the congregation to critical votes about UUCSEA’s future.
2. The board is already working on clarifying the church finances. With the congregation’s growth, the finances have become more complex. Some operating funds have been co-mingled and are being sorted and properly accounted for. The board has recently hired a bookkeeper to assist with the finances.
3. There are many volunteer jobs of various sizes. Often the same volunteers are doing many of the jobs. Set up and take down for Sunday services are two such ongoing tasks being done by many of the board members that could be handled by others.
4. Communications were mentioned as a being sometimes difficult. There is a call for greater transparency and some congregants reported difficulty navigating the website which is a main resource for communications.

### **Staff and Programs**

1. Rev. Rod Richards is a dynamic preacher whose ability to nourish souls is gratefully accepted by the congregation. Rev. Richards also gives voice to liberal religious thought via a local radio program. He and his wife recently purchased a home in nearby Bisbee as a sign of his commitment to staying with the congregation for the foreseeable future. He is patient and provides gracious space for the congregation to determine their future.
2. In addition to the minister there is a part time music director and part time assistant music director. There is an opening for a part time assistant for the minister. Staff is compensated within the UUA’s fair compensation guidelines.
3. Adult programs are in place but limited due to lack of space.
4. The minister does not have an office and works out of his car. He is not connected to any church databases and relies on information coming from board members and informal means. The minister holds “office hours” on Tuesdays and Thursdays by reserving free room space at the library.

5. Volunteers put a significant amount of energy into set up and take down for services every Sunday. All supplies are stored in various members' garages, basements and other personal storage areas. There is no clear accounting for where various materials lie or amount of resources held on the church's behalf.

### **Proposed Capital Project**

1. UUCSEA is a church community regardless if it has a building to call home. It is a very caring and loving community doing good work. Congregants enjoy each other's company. Many have shared their gifts generously. (The next sentence seems a little confusing) There is no consensus on the value having a building will bring to the congregation. UUCSEA has gathered in nine different locations in its 12 year history.
2. The congregation has had many discussions about the need for a permanent home. Over several years, unsolicited contributions were kept in an account which allowed the church to purchase a four acre parcel on the edge of Sierra Vista for \$68,141. The location continues to be up for discussion and no further action to build has been taken. The land was purchased to be the future home of the church. A similar lot more centrally located in Sierra Vista would cost millions of dollars.
3. In February 2008, the building committee, at the request of the board, made a presentation to the congregation about how the land and building might look. This caused confusion for some who interpreted this to mean that a building was imminent. The consultant noted that from the possibilities presented in the proposal, it assumes that the vision question has been answered and the decision was to remain unchanged; exactly the same size with the same level of program activity and staff. The plans also reflected costs within the rule of three times the annual operating guidelines. The possibility of carrying a mortgage has been considered.
4. There are several factors that still need to be considered before moving forward on a capital project.
  - Clarify the shared vision to understand what purposes a new home will need to serve. The vision should help answer questions about the desired growth, potential programming and how church life will be enhanced by a permanent home.
  - Determine what affordable locations exist that are convenient for current members and will be readily accessible to future members, especially families with young children.

What possibilities a permanent home will afford the congregation can only be answered once the congregation is clear about the future direction of the church.

**Annual Stewardship Budget Drive**

The congregation has been very generous and has increased their level of support to meet goals that they have established such as calling a full time minister. The operating fund has grown from \$25,000 to over \$100,000 in just five years. The pledge drive is led by co-chairs who recruit team members. Each team member calls seven to ten households to ask for their participation. Calls are generally done by phone or e mail and do not ask for a specific dollar amount. There has been no introduction of fair share giving concepts.

Below are figures made available to the consultant by the membership and annual budget drive committees and the UUA congregational history report.

FISCAL YEAR	# PU*/ CONGREGANTS	TOTAL PLEDGED	AV PLEDGE	MEDIAN PLEDGE
2005-2006	54/87	\$ 96,901	\$1,794	\$1,145
2006-2007	48/79	\$104,690	\$2,181	\$1,284
2007-2008	56/83	\$110,016	\$1,965	\$1,304
2008-2009	54/83	\$109,938	\$2,035	\$1,325

**\*PU = Pledge Units**

During the 2008-09 annual budget drive, there was some concern about transparency in the church’s finances and six members declined to pledge or pledged at a lower level. One of those six, a first quartile contributor, decided to leave the congregation. (Mary, 2 passed away, the rest moved)The final results of the drive are \$8,000 shy of goal. The board is working with the congregation to fill this gap.

A look at the quartile analysis also reveals proportional giving as follows. The first column of number represents the actual results for 2008-09 and the second column of numbers is the ideal distribution.

	<b>Quartile Analysis</b>	
	<u># donor units</u>	
	<b>Actual</b>	<b>Ideal</b>
1st quartile	7.4%	10%
2nd quartile	11%	15%
3rd quartile	25%	35%
4th quartile	58%	40%

This means that 50% of the budget is contributed by only 18.4% of donor units or nine households. The average age of this group is 76. Ideally 50% of the budget would be contributed by 25% of donor units. The goal is to secure the church’s financial base over as many congregants as possible. Below are some comparative giving figures from other UU congregations around the country. These numbers are from 2006-07.

Congregation	ANNUAL GIVING LEVELS		
	# of Donor Units	Mean	Median
Somerset Hills, NJ	82	\$2085	\$1500
Roswell, GA	115	\$1967	\$1380
1st U Chicago, IL	95	\$1929	\$1320
Pasadena, CA	355	\$1919	\$1080
Dallas, TX, 1st UU	548	\$1866	\$1000
Paint Branch, MD	148	\$1851	\$1320
Annapolis, MD	261	\$1820	\$1200
Emerson, Marietta, GA	62	\$1752	\$1300
Macon, GA	71	\$1714	\$1020
Reston, VA	139	\$1712	\$1200
NW, Atlanta, GA	122	\$1666	\$1200
Summit, CA	78	\$1663	\$1200
Woodinville, WA	102	\$1591	\$1200

### Membership

1. As of February 2008, UUCSEA has 83 members and 4 children. Since calling a full time minister the congregation has grown by fifty percent from approximately 60 to 90 members. This is a testimony to the excellent sermons that congregants describe as inspiring and relevant. Rev. Richards also hosts a radio program bringing a liberal religious voice to current affairs. Additionally, the church advertises its Sunday services and invites newcomers via radio ads on two stations. Newcomers report having heard about the church from the ads and broadcasts. Outreach is strong, positively received and appropriately tracked for effectiveness.
2. UUCSEA is a very caring congregation. The Care Teams are well organized and provide excellent service to the individual congregants. They are a main vehicle for ministry and for communicating important information. Each team leader is listed under the care of another team leader. It appears that no one falls through the cracks when it comes to good care.
3. In 2007-08, there were 52 adult visitors that signed in. Eleven returned for a second visit. Visitors to UUCSEA are warmly greeted and asked to sign in. The minister follows up with visitors and there is a complete packet of information for those who wish to consider membership. The packet includes a pledge card but new members are not specifically asked to pledge. The website is password protected for information regarding board meetings, policies and finances making it difficult for visitors to get a feel for how things are working at the church. New members must first meet with the minister. They are then given the option of signing the book in private or during a Sunday service.
4. UUCSEA is interested in growing and attracting young families. Currently the average age of the congregation is 72. There are three to four children in RE at any given time. Obstacles to growth include their location in a conservative, military community. Families that attend are usually military families that transfer out in two years or less.

5. There is a desire to have a more robust children's RE program in order to attract families but it is difficult to plan a program until more children are enrolled. Currently there are four volunteers who have led the children's RE program. They are approaching burn out and little interest has been shown by others in the congregation.
6. The welcoming experience was very friendly. The order of service was unclear to the consultant as a visitor. She had difficulty finding the chalice response and could not participate. The visitor packet is very complete if a bit overwhelming with the number of letters from various representatives. The newly designed brochure is attractive and informative. Materials do not include the church's mission statement.

### **RECOMMENDATIONS**

1. Post this report on your website and make paper copies available to anyone who would like one. Encourage congregants to read this to begin healthy discussions in a focused manner.
2. Many of the recommendations below are further explained in the book *Beyond Fundraising* by Dr. Wayne Clark, director of the UUA Congregational Stewardship Services. This is a comprehensive book that will guide the board and congregation through planning and implementing many stewardship related programs. It will also provide the board with a clearer picture of how all the various steps are part of the same continuum that could lead to a successful capital campaign. Multiple copies are recommended so that several people can read it at one time. Circulating the books so as many congregants as possible can read them is also recommended. Books can be purchased online through the UUA bookstore for \$18. [www.uua.org](http://www.uua.org).

### **Vision, Mission and Strategic Plan**

1. There was much discussion about whether or not a permanent home is best for the congregation and where the best location would be. There was no agreement about the future size of the congregation and how best to grow if at all. It is recommended that the congregation engage in a Searching For the Future workshop. This will help clarify the vision for UUCSEA. By solidifying the vision, focusing it into a clear, concise and easy to remember statement, dynamic planning for the future can begin. Clarity of vision will provide a framework for deciding about a permanent home, its location and how best to grow.
2. Once the congregation has completed this weekend, the board can then lead and develop a strategic plan with the full involvement of the congregation through committees, written communications and congregational meetings.

### **Board of Trustees**

1. The board is encouraged to organize the committee structure to help sort out which are imperative for church operations from those that provide more social interaction, social justice and outreach activities, and those that are pastoral in nature. Sorting these out it will help to establish lines of communication.

## Unitarian Universalist Association Congregational Stewardship Services

Communications are a shared responsibility and a system needs to be designed that allows people easy access to find and share appropriate information. Congregants are encouraged to seek out information they desire and to share information about their activities as it relates to the congregation.

2. The board is encouraged to assign one or two members to compile the congregation's history and to make the church historian role a formal one that can be assigned for a one or two year period once the initial history has been documented. By making it ongoing this role is then charged with documenting current events which is easier and more reliable than looking backwards.
3. The board is planning to review and document all policies and procedures so that they can be shared with committees and passed along to future trustees. This will be very important as the church grows, the work is shared and the issues become more complex. There will be some that need to be added. If the board would like samples of work from other congregations they are welcome to contact the consultant or the UUA. Many congregations are happy to share their documents with other congregations with a direct request.
4. The board is to be commended for their due diligence on the finances. When the accounting measures are in place and the funds have been properly accounted, sharing the new information with the congregation in writing will help dispel the transparency issue. This will help everyone understand where the church finances are, what information the board is working within and how things will look in the future. Specific information including the amount, use and restrictions of the named and other funds would also help clarify the level of available funds.

The plans to form a finance committee will help ensure greater accountability and clear reporting. Contracting with a professional to review the records and provide counsel will help keep the church in compliance.

5. There is a lot of valuable information kept on the website that is password protected. Revisiting the decision to do this and which information needs to remain protected may also help with transparency. Visitors may negatively interpret their not being able to access information.
6. Trustees, staff and interested congregants may find many helpful discussions involving topics including money and leadership on the UUA listservs. You can sign up at [www.uua.org](http://www.uua.org). Type "listservs" in the search box on the upper right hand corner of the home page. It will take you to a list of many topics (250 in all) and you may sign up for as many as you wish. It is also possible to search recent discussions for immediate input on a topic. UU\_Money and UU\_Leaders are two you may find most helpful.

### **Staff and Program**

1. The minister has been working out of his car since he first started with UUCSEA as five years ago. While he has not voiced discomfort with the situation he agrees that having an office would afford him and the congregation much easier access to each other. The consultant recommends that the congregation rent office space until a permanent home becomes available. The office would best serve the congregation if space is allowed for a private minister's office, storage

space for church supplies, a small conference room for meetings and other church business, a copy machine and other creature comforts including access to a restroom. This would also allow for a space where congregants can be sure to find information, be able to post information and church records can be accessible. Ideally there would also be room for the music director to have a desk and to store music.

Financing for the office might initially come from the various funds that are in place and are available for operations. The expense for an office can then be gradually shifted from these funds in to the general operating budget.

2. The minister should be connected electronically to all church records. It is important for him to be able to access databases in order to minister to the church.
3. References were made to the various personal garages, closets and other discrete places that church supplies and records are stored. There does not appear to be a record that identifies where each thing is being kept. It may be helpful to have such a list as well as to get a graphic representation of exactly how far spread the church's resources are. It may be prudent and increase efficiency if the church invests in a storage unit.
4. Children's religious education is difficult to address because there are currently only a few children of various ages. It seems to some that if a full program existed more families would come. It is recommended that the RE program pick a starting point and build the program slowly. For example, you could focus on attracting families with children ages 6-10. They will likely bring younger and older children along and as they arrive programming can be added. The goal is to start somewhere rather than wait for a full program that may or may not meet the needs of new families. This will focus volunteer efforts and may be helpful in recruiting new energy for the program.

### **Proposed Capital Project**

1. The speed with which you can talk about a campaign depends on how quickly the congregation would like to complete the visioning process and begin strategic planning. A timeline for a campaign can be developed once it is determined that a building is in fact an agreed upon goal of the congregation. If a SFTF workshop is held in the fall of 2008, a vote to adopt a strategic plan could happen as early as spring of 2009.
2. Other critical indicators for success with a capital campaign are having a successful annual budget drive and introducing fair share giving concepts. This will help the congregation become comfortable with talking to each other about financial commitments. It is recommended that this approach be used for the fiscal year 2010 drive held next spring.
3. The building committee should be formed and prepared to develop at least three options for the congregations' consideration once planning is far enough along to indicate space needs. Similarly, a committee to review locations and costs can be working to inform the building and capital campaign committees.

Involving as many congregants as possible with at least a task or two for these committees will help build a shared understanding of the resulting proposals for building.

4. A software system that can track both capital and annual pledges will greatly aid in the accounting and in producing pledge reminders and individual reports for congregants.

### **Annual Budget Drive**

1. The annual budget drive committee has done an excellent job at securing congregants financial commitments. (*Participation rates? Jerry will get back to me.*) The approach and success of the next annual budget drive will be important to prepare the congregation for a possible capital campaign. Regardless of the decision to have a capital campaign, UUCSEA would benefit from a personal, face-to-face approach incorporating fair share giving guidelines. This highly personal approach will begin discussions about generosity in response to the value of the church in one's daily life. It will also begin to elevate some financial commitments toward higher quartiles bringing UUCSEA into closer alignment with the ideal distribution (see p. 5, Quartile Analysis). It is recommended that a UUA stewardship consultant assist in this process. A quote for these services is attached.  
8 of the 83 members did not pledge. However, 5 Friends did pledge.
2. While the congregation is not encouraged to focus their energy on an endowment campaign at this time, the average age of congregants suggests that some efforts toward asking members to include UUCSEA in their estate plans could be made. One possibility is to add a line on the annual pledge cards where congregants can indicate their intentions to include UUCSEA in their estate plans or request more information about how to do so.

The board is encouraged to adopt policies regarding how funds from estate plans will be dispensed. Other gift acceptance policies are also recommended especially should a campaign be in the offing. The consultant will send sample policy statements to the board chair.

### **Membership**

1. To help attract visitors and new members there are some simple things that can help bring visibility to UUCSEA that can be implemented right away
  - a. Volunteer groups from UUCSEA could identify themselves as being from the church. This can be done by wearing your nametags, wearing church t-shirts or vests with the church name and logo on them. The vests can easily fit over clothing and volunteer groups return after each use. This would be a one time investment with great returns.
  - b. Not uncommon within UU congregations, there is some discomfort talking about "our church" or identifying ourselves as representing a religion. It would be helpful if some common language can be reached to help talk about UUCSEA in the community and allow others who may be looking to find this beacon of liberal religion to do so.
2. The new member packets are attractively assembled and contain good information. There is a new brochure included. However, none of the individual

elements include the mission of the church. Adding that to the brochure would help prospective members decide if UUCSEA is right for them.

3. There is no discussion with new members about their financial commitments. The only indicator is a pledge card in the packet. New members often want to participate fully and can be asked more directly. This can be done by a member of the membership or the annual budget drive committee.
4. UUCSEA may want to approach other area churches of any denomination to inquire if and how they are attracting young families. It may be that the issue of attracting young families is not unique to UUCSEA.

### **Closing**

It has been a pleasure working with the good people of UUCSEA. You are a very caring community providing a liberal religious voice in an area that would otherwise not have that option. I am optimistic for your future as you clarify your vision and begin to attract others who share your values. I hope this report gives you enough information to begin your work. If you have any questions as you review this report, please do not hesitate to contact me. I look forward to working with your congregation as you proceed. If, however, you would prefer to work with a different UUA stewardship consultant please contact Wayne Clark and he will be happy to assist you. I wish you much success in your endeavors.

Most sincerely,

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cc: Ken Brown, PSW District Executive  
Wayne Clark, UUA Director of Congregational Stewardship Services

Sample gift acceptance policies  
Searching For the Future Workshop information  
Sample committee charter with theological statement of purpose