



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

**Next Steps Weekend Report
Unitarian Universalist Church of Chattanooga, TN**

I. Summary of the Next Steps Visit

The Unitarian Universalist Church of Chattanooga, TN engaged Stewardship Consultant Bill Clontz through the UUA Congregational Stewardship Network to conduct a *Next Steps Weekend* and to prepare this report. The visit focused on the congregation's health in all areas, with particular emphasis on stewardship and conflict management as it affects decision-making and the stewardship environment. This report contains observations in areas of strength, challenges, recommendations, and supporting material. Bill met with over 60 leaders, staff, and members in a series of 16 meetings. Bill attended the Forum, Sunday services, and Coffee hour, followed by two follow-up meetings. The schedule is at Appendix A.

II. Background Data

Name and Mailing Address of Congregation	Unitarian Universalist Church of Chattanooga, 3224 Navajo Drive Chattanooga, Tennessee 37411
District/Region	South East/ Southern
Website Address	http://www.uucc.org
Developmental Minister	Rev. Cathy Harrington
<i>Key Leaders/Staff (a <u>partial</u> list)</i> Leslie Brock, President Frank Caperton, Past Pres. Monique Lewis, Pres. Elect, Qtrly Council Chair Jim Welborn, Secretary Daidee Springer, Treasurer Greg Cruz, VP for Congregational Life Ministry Linda Park, Vice President for Outreach Ministry Cecile de Rocher, VP for Religious Growth Ministry Buck O'Rear, VP for Resources Ministry Paul Adler, Bldgs & Grounds Buck O'Rear, Stewardship Maurine Olin, Membership Judith Pedersen-Benn, Social Justice George Helton, Endowment Karl Hunt, Finance	<i>Staff:</i> Kay McCurdy, Director Rel. Ed. Jennifer Arbogast, Director of Music Chris Tregaskis, Office Administrator
Visit Point of Contact	Buck O'Rear
Membership/ Commitment Units	131/90
Annual Financial Commitments, 2012-13	\$151,320
Avg. Household Financial Commitment	\$1,759
Median Household Commitment	\$1,200
Current Operating Budget	\$195,446
Endowment. Funds in Operating Budget?	\$69,873 No
Operating Reserves? Mortgage?	Yes. No.
Last Budget Drive Approach; % of goal attained	Commitment Sunday - 71%
Last Capital Campaign	1978-81
RE Enrollment	47
Fair Share Congregation, Region and UUA?	Yes
Consultants in the Past Three Years	Connie Goodbread-2013, Gail Sphar- 2014



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Objective of the Next Steps Visit

The visit addressed all program areas, focusing on the overall health and operations of the congregation. Additional emphasis was placed on financial health of the congregation, the stewardship environment, and internal communications.

Prior to the on-site visit, Bill reviewed substantial material provided by the congregation in SEP - DEC, including information on finances, membership, programs, staffing, by-laws, church history, community engagement, outreach, recent annual reports, newsletters, the church web site, and Facebook page. Bill also had telephone conversations and email exchanges in advance of the visit with Buck O'Rear, the visit point of contact, as well as with the minister.

A Next Steps Weekend is a highly concentrated event. It depends upon the timely sharing of a very large amount of information over several weeks and a well-coordinated visit on site. Special thanks go to visit coordinator Buck O'Rear, Administrator Chris Tregaskis, and others for bringing this all together. The thorough preparations for this visit made it productive and pleasant.

The fact that many people gave so much of their time, especially over a weekend and a weekday evening, is gratefully noted. This speaks to the sense of community at UUCC and to the dedication of leaders and volunteers to serve. So many people told me they felt they had come home when they joined UUCC; I saw that spirit throughout the visit.

III. Overview of Findings

A lot of things are going well at UUCC and a fairly new perception of stability is generating a spirit of continuity and possibilities. The staff works exceptionally closely as a team, with a shared vision for where they hope to see UUCC go. All this provides a reserve of community and energy that UUCC can draw upon in the months ahead.

The congregation has much to be proud of and to celebrate. There are some decision points approaching and some institutional challenges to be met, as described in this report, but nothing in evidence that presents unsolvable problems or challenges that UUCC cannot address successfully. Addressing these areas effectively and aggressively will put the congregation in a stronger position, forestalling problems and building on UUCC's strengths for the future. There is no reason why UUCC should look forward to the months ahead with anything other than a spirit of optimism. The opportunities and choices are there. It is important that key areas, such as stewardship, be placed on the right track; this is entirely doable.

This report recommends that some time and effort be invested in getting a number of processes and programs well established and on a healthy footing and more importantly, in being clear to yourselves what your priorities are and why they are important. This includes improving the stewardship culture that supports UUCC at a level matching your sense of community and purpose. This process of prioritization and investment of time, talent, and treasure will underwrite future major efforts and will provide the congregation



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assurance that UUCC is working well. A healthy mix of practical judgments and dreaming beyond today will position UUCC to fully realize its mission and vision.

IV. Commendations and Strength

- 1. Strong Small Group Ministries Program:** The SGM program at UUCC is exemplary in its breadth and depth. It seems to be serving its core purposes well and the fact that new leaders are stepping forward bodes well for the program and for the congregation as a whole.
- 2. Good Identification of Challenges:** A willingness to look critically yet constructively at challenges for UUCC, including relationships and communications, was in evidence throughout the Next Steps Weekend. This readiness to go beyond easy assumptions and to avoid the negative aspects of past conflicts is admirable. This will serve UUCC admirably in the coming months.
- 3. Community Engagement and Interfaith Cooperation:** The Social Justice team has done a fine job of making connections and having an impact locally. The focus on social justice, human rights, and environmental issues reflects the congregation's priorities. Those most involved in Social Justice and Environmental Issues understand that the most important charter bestowed upon them is not to do the work themselves, but to lead and coordinate those activities for the entire congregation, involving as many members as possible.
- 4. Financial Procedures:** The procedures and policies for financial matters established by UUCC are among the clearest and best written I have encountered. Followed in letter and spirit, they will ensure good results and confidence in the fidelity of the system to good accounting and handling procedures.
- 5. Good Recent Use of the 3Ts (Time, Talent, and Treasure) Stewardship Approach:** The recent effort to expand the annual budget drive to a more comprehensive focus that includes volunteering is admirable and should be continued. The literature developed in support of this effort is exemplary.
- 6. Realistic Prospects for Modest Growth:** UUCC is a relatively small congregation in a major metropolitan area. A conservative but realistic review of growth potential and personnel turnover of membership at UUCC would indicate growth is an obtainable goal. UUCC is a unique institution in its area and there is a population locally that needs what you offer. Sustained modest growth is entirely achievable.
- 7. A Team Ethic Among the Staff and within the Board, Connecting with the Developmental Minister:** UUCC has been through some challenging conflicts and tensions in recent years. Such a recent history could leave a residue of dysfunction, but the leadership team has deliberately chosen another, better course. I was impressed with the congeniality and spirit of mutual support among the staff. Recommend the



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Administrator join the Association of UU Administrators, with UUCC paying the modest dues. This adds professional skills and valuable networking with other UU Administrators.

The Board seems genuinely committed to working together as a team. In addition, both the staff and the Board have positive relations with the Developmental Minister, as does the congregation at large.

- 8. A Good Start on the Share the Plate Program:** There is a well-established Share the Plate program that obtains good results and encourages the congregation to think beyond their own group. Recommendations are included later in this report to build on and expand that program as a step toward a richer stewardship environment.
- 9. Strong Efforts Supporting Buildings and Grounds/Landscaping:** The volunteer efforts at maintaining and caring for the building and the grounds are noteworthy and apparent to the visitor. There are resource issues that need very much to be addressed, as noted later in this report, but this does not detract from the good work done by many, over the long term, with plans afoot for still more good results.
- 10. An Effective and Innovative Outreach Tool with NPR Sponsorship:** The innovative combined donation program to the local NPR station provides excellent outreach for UUCC at no cost to the budget, while supporting an institution important to many members of the congregation. Kudos!
- 11. A Vibrant Children and Youth Religious Education Program:** UUCC clearly seeks to be an inclusive and welcoming community to young families. While it is important to welcome all generations and to provide a variety of worship experiences recognizing different needs for different members, the innovation and energy in the RE program is contributing to a multigenerational community that appreciates what every age group brings to UUCC.

IV. Observations and Areas of Challenge

The first two observations in this portion of the report, dealing with stewardship and how it fits into the broader ministry of UUCC, are closely linked to each other. While they share common elements, they are not the same; the first is more symptom, while the second is more of an enabler. In both, these are not just technical issues. Many of the tools and techniques we discussed over the weekend and in this report are well known to the professional and lay leadership, and some have been used as technical solutions.

The heart of the matter is whether the leadership agrees with the observations below and if so, is willing to set a course to address them with the entire congregation over an extended period. If, on the other hand, the leadership is convinced that change is not achievable or that the points highlighted in this report do not, in their judgment, actually



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constitute a concern for UUCC, then simply applying some of the recommendations made in this report are unlikely to have any impact.

Equally important, the members of the congregation must decide if they are ready and willing to assume full responsibility for the health and future of UUCC. Are you ready to accept both the joys and responsibilities of a congregational community? I think you are, but only the membership can make that a reality.

1. **The Distribution of Annual Commitments is Not Healthy:** A graphic depiction of UUCC's annual giving (pledge) distribution, compared with a healthier, sustainable giving pattern, is at Annex B. The concerns are evident:
 - The number of households contributing the top 25% of pledged income (the first quartile of pledge totals) is one-third fewer the number needed for healthy distribution. This places a very large burden on comparatively few households and puts the congregation at financial risk at any time.
 - Approximately half of the total amount pledged annually comes from only 15 households (the first and second quartiles of total pledges). This magnifies the concerns noted above.
 - The percentage of member households contributing only 25% of the total pledged amount (the fourth quartile of total pledges) is almost 20% larger than is considered healthy; approximately 65% of members contribute only 25% of the total pledged amount. The drop in the Mean and the Median pledges in this category compared with the third quartile is very substantial, much more so than the differences between other quartiles.
2. **The Stewardship Culture Lacks a Full Measure of Candor, Commitment, and Open Discussion:** Not every one can give at high levels, of course, and some people will have need of a waiver during challenging times, but the distribution pattern noted above likely indicates that some members do not fully understand or accept a sustained financial commitment – at whatever level is manageable – as a core element of their membership. In part, how the stewardship dialogue has happened over the years at UUCC has contributed to this situation.

The operating assumption should be that we all seek to do the best we can in all of the T's (time, talent, and treasure), that each of us recognizes the importance of all three types of commitments, and that given good information and a sense of community, each member will come to the right decision for them and for UUCC. Members' financial commitments sustain the other ministries and makes them possible.

Separating stewardship into a stand alone concept that focuses mainly on paying the bills inevitably undercuts sustainment of the overall ministry. It inadvertently sends the message that while we speak often of the three T's (time, talent, and treasure) and how important our UU community is to living our values, we may not mean it; of all the things we might value, the congregation is one we need to support with our



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resources – it should have our first level of support, in challenging times as well as in times of plenty.

The distribution of gifts pattern surely does not indicate a lack of generosity and community at UUCC. It more likely is indicative of the absence of a sustained, integrated conversation about the role of stewardship in the life of the congregation and how it relates to every member. This calls for an extended congregational conversation about being in community, living UU values, and supporting the ministry in every way as best each member can, including financially.

Emphasis on the Fair Share Guide is a helpful approach that takes into account individual capacities to contribute. Publishing program budgets and gift distribution ladders also enable members to understand the issues and to see their role as stewards. New members are often not offered the opportunity to pledge until the next budget drive cycle, often months away. This sends an unclear message about the expectations of membership and costs the congregation much needed resources. Providing reinigorated and professional visiting steward training to a renewed and expanded cadre of visiting stewards would also help greatly.

But these are only tools, some of which UUCC has previously employed. What would make a difference is the willingness of lay and professional leaders to take this on as a core ministry in which they lead by example and for which they are prepared to speak with members honestly, in candor, and in community. Short of that, tools will be helpful but insufficient. Funding shortfalls are substantial, but can easily be erased by very modest increases across the membership. This is not a problem to be resolved by a few major contributors stepping in; it is one to be resolved by the entire UUCC community, with everyone making modest increases to carry the day.

- 3. The Endowment Fund Would Benefit Greatly from a Legacy Society:** The endowment is a cornerstone of UUCC's future and provides an important opportunity for members who want UUCC to be there for future generations to make a valuable contribution. The Fund itself and a component that could be referred to as a Legacy Society are not as visible as they good be, nor is recognition of those who participate. Goals for fund growth are modest. The number of households already participating is reasonably good, indicating the interest is there and ready for encouragement. It is possible that more households actually have UUCC in their wills and estate plans and the leadership is unaware of these commitments.

These areas are easily addressed and should be without delay. The brochures are a good start but should be complimented as noted in the Recommendations section below. The committee needs to raise the visibility of the endowment, make it easy for members to learn about it and to contribute, and ensure the membership knows what an endowment provides (future security, funds to invest in major projects, income that could support the budget, collateral for loans, etc.).



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4. **Not Using Fair Share Guide Fully:** The Fair Share Guide has been made available to members but has not been well explained or emphasized. It is a valuable tool in helping members think about the right pledge level for their households. It should be emphasized, members should be asked when making a pledge if this is a Fair Share commitment in accordance with the Guide, and copies of the Guide, along with explanations of how to use it, should be easily accessible all year.
5. **Not displaying a True Program vs. Line Item Budget:** The recent efforts to depict budgets as pie charts rather than just as line item budgets is the right course, but the depictions used are still oriented on line item components (compensation, building costs, etc.) rather than program areas (worship, denominational connections, RE, Outreach, etc.) that tell the members what is being done with the funds contributed. Line item budgets should always be available for review, but program budget depictions do a far better job of illustrating what is being accomplished with congregational funds.
6. **No Standing Stewardship Committee:** Stewardship is currently addressed as a subset of the Finance Committee and largely restarts every year in a somewhat informal process, involving the same handful of volunteers who have a myriad of other volunteer obligations. The absence of a standing committee that addresses stewardship and helps lead the stewardship dialogue all year is one major factor behind the stewardship shortfalls discussed throughout this report.
7. **No Unfinanced Requirements List Widely Circulated or Known:** The majority of members do not know what the current shortfall in pledges translates to in terms of financial risk or deferred investments. There is a relatively well-developed list for deferred maintenance items on the property, although it is not widely circulated, and no such list for program areas that detail what could be accomplished at what costs if additional funds were available. Having such a list, prioritized by grouping (urgent and essential; important; and desirable as funds are available) would contribute to congregational understanding and engagement.
8. **No Long Range Plan or Group to Do Such Planning:** No one is looking out 3-5 years in any systematic way to help the congregation think about its investments of time and resources and what the membership would like UUCC to look like in a few years. A lack of visioning and supporting plans makes it difficult to commit in meaningful ways to the future of UUCC.
9. **Volunteer Recruitment, Key Volunteer Replacements:** As is the case in many congregations, UUCC has a small number of key volunteers who carry multiple responsibilities, and have done so for years. The risk of burnout and sudden drop off of key personnel support is very real, a situation the leadership and these volunteers recognize. There is no magic bullet to address this, but encouraging a volunteer culture, perhaps using the 6X6 volunteer program we discussed (copies will be forwarded) and developing good volunteer descriptions for all key roles and groups



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would help a great deal. Make it easier for people to volunteer for specific tasks and programs rather than starting with commitments to committees and the volunteer rate should improve. Making progress in this area is important not only for the functioning of UUCC but also in building community. Members who develop “sweat equity” in the congregation are those who genuinely grow into deep commitments and become the next generation of leaders.

- 10. Technology:** UUCC has made good use of technology in its website, e-blasts, and use of social media. The one anomaly was the insistence on moving from Microsoft Office products to Google products for staff operations. Speaking as one who uses Google products extensively in my work, I understand the appeal of such an approach, but the process to decide on the change seems to have been arbitrary and without consultation with those doing the work (the staff). Microsoft Office products remain the tool of choice for many in the business and nonprofit sector, and the tools with which the staff is uniformly more comfortable. They should be encouraged to use products such as Google tools, but should go back to using the tools they know best until they choose to do otherwise. The current arrangement is hurting performance and has created unnecessary consternation.

One additional technology note: as near as I could determine UUCC has a Facebook page; consideration may be made to also establishing a Facebook Group that allows candid exchanges among members that is not visible to the general public. Many congregations have found this to be a valuable adjunct to their internal communications.

- 11. The Staffing Level in RE Seems Too Modest for UUCC’s Needs.** The RE program for children and youth is a genuine asset for UUCC and attendance is growing. The program has potential to do still more, given adequate staffing levels. The DRE has the capacity to develop the program further and to expand her role to that of a Lifespan Spiritual Growth Director, with primary responsibility for Adult RE/Enrichment as well. This is the path being followed by many UU congregations, recognizing that learning and growth is a lifelong pursuit and structuring their programs accordingly. As the stewardship results improve, expanding RE staff hours is a worthy goal that will pay dividends, and could be an incentive for increased giving by members.

- 12. The Board Could Make Better Use of Its Time:** In talking with Board members and after reviewing the minutes of Board meetings, it appears that meetings are often consumed with permission granting activities and detailed change reviews. These are activities often better handled by policy changes or by the Quarterly Council or individual committees empowered to perform such functions, with the Board providing post activity reviews. Most issues should not be treated by the Board as the first line of action. Focusing on policy and overall functioning of UUCC, and less on housekeeping and granting permission activities, frees the Board up to lead more and manage less. It also is likely to lead to shorter, more productive meetings and more



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rewarding tenure among Board members. Agenda items should routinely be viewed through three questions: (1) Should this be treated by a policy development rather than as a single incident? (2) How does this support our mission and vision? (3) Is the Board the right level to address this: who else has reviewed and inputted into it?

13. Youth Connections Need Work: I heard of several occasions wherein Youth Members volunteered for key roles but eventually dropped out, in at least some cases because they felt marginalized. A conscious effort on the part of both Youth and Adults to ascertain what happened in the past and how Youth participation can be better integrated is worth the investment of time by all concerned. Youth and Adults are, in reality, two different tribes in many ways, with different imperatives, experiences, and subcultures. But you are all part of the UUCA community and have much in common. Some give and take and honest two-way dialogue is worth having.

On a somewhat related matter, consider encouraging the start of a Young Adults and/or Singles Group, depending on your specific demographics, as one way to encourage participation and a wider sense of community.

14. Internal Communications are Uneven: Several of our sessions over the weekend highlighted the need for increased emphasis on internal communications among staff and stakeholder members. On a number of issues or initiatives, some participants were well aware of activities or goals and others had no information regarding any of these processes. Some communications gaps are not unusual in times of transition or tension, but minimizing them should be a priority for the leadership.

Two imperatives are most important (1) No surprises – stakeholders (defined broadly) should be fully included in planning, goals and timelines. They need not agree with changes underway, but as members of the congregation who have toiled in support of UUCA, they should not be overlooked. Develop a culture wherein every meeting ends with the question, “Who else needs to know about this or might be interested in what we are doing?” (2) Ensure processes and decisions are consistent with the church’s bylaws and procedural guidelines, so that good process is honored. Everyone involved in these conversations over the weekend recognized the good intentions of all involved and pledged to stay in covenant with each other.

I saw numerous examples of unintentional poor communications that can be corrected with a little intentionality. People did not know how or where to sign up for e-blasts. The Administrator advised when asked that from time to time she has been surprised by Board activities or plans; it appears she is not fully integrated into Board communications. I was most concerned to learn in my preparations for this visit that BOT minutes had not been posted for members review for almost a full year. This should be unacceptable. Any such lag beyond a few weeks conveys the wrong message on several fronts. These are indicators that some work remains to be done.



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- 15. Space and Facilities Maintenance:** As noted earlier, some excellent work is being done by talented and dedicated volunteers on the buildings and in landscaping. Two areas, however, are cause for concern:

Although a good list of required and deferred maintenance has been developed, there is no reliable funding for programmed and contingency maintenance, and existing funds in this category are subject to being used elsewhere. UUCC now has a substantial backlog of work in this area. At best, this results in a very large maintenance bill that could have been much more manageable if addressed in planned increments over time. At worst, it will result in very expensive emergency repairs done in a rushed and disruptive manner. The unfinanced requirements list needs to be circulated much more broadly among the membership, along with associated costs. As the stewardship picture improves, this is a priority area. Once the annual budget drive is on a solid footing, regular replenishment of the maintenance account should be enforced, and the leadership may wish to consider a small capital campaign to restore the account to a level that adequately protects UUCC

While much good work is evident, additional focus will pay dividends. It is widely recognized that visitors unconsciously decide in about the first five minutes on your property if they are likely to return. As a new arrival on your campus, I liked much of what I saw upon entry and in the Sanctuary. However, when I went downstairs what dominated my view was badly worn and stained carpets and open areas used like a basement for not especially well organized storage. It did not communicate a place loved by its members or respected for the roles it serves. The membership also likely has this feeling in its unconscious. These are visual cues that affect how people interact and they are easily addressed with minimum effort and at reasonable cost.

- 16. Safety Issues:** UUCC occupies a complex two-story building. The user population contains many children and some adults with mobility challenges. I recommend fire drills and emergency procedures training, including for disruptive or dangerous persons. The UUA Crisis Ministry Team, as well as other UU Congregations and your local first responders can help in this area. Note also that few even know you have an Automatic Emergency Defibrillator (AED), and still fewer know how to use one. Make the unit more visible, consider training more people to use one (the Red Cross and the Heart Association can help), and consider a second AED downstairs. Ensure AED(s) are regularly checked and batteries replaced on schedule.

- 17. Quarterly Council Should Have More Key Roles:** The Quarterly Council is an under utilized talent pool that has unclear and inadequate responsibilities. Among the responsibilities the Council could assume are writing and reviewing policies for Board approval, developing and regularly reviewing charters for standing committees, consolidating budget requests that now go one at a time to Finance, and coordinating among committees for volunteer support and leader development. Much of the detailed work now done by the Board could be better done by the Council.



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18. Mission and Vision Statements: While the current mission and vision statements no doubt represent a great deal of effort by its authors, they are not known by the membership or leaders (I found not one person who could tell me what they said), they are not used to guide the congregation or to validate priorities, they do not provide a good foundation for a strategic plan, and they simply are too long to be useful. I recommend consideration of conducting a Search for the Future process with a stewardship consultant. This is a unique, rapid approach that does an excellent job of developing mission and vision statements that anchor the congregation and articulate who you are, why you are together, and what you wish to become in very clear and brief language. Your minister is familiar with this process.

VI. Additional Recommendations

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

- 1. Connect to Other UUs:** There are many UU congregations and many individual UUs with great ideas; work to connect with them. Many of your leaders make good use of the UUA email groups and the many Facebook UU Labs. All should be tapping into these resources. Develop cluster relationships around functional areas like membership and stewardship. The technology allows you to do so without being physically together every time you meet. Consider hosting a cluster event; regional staff offers great assistance in doing these. Cluster events also offer the chance of sharing the cost of support. Make a conscious effort to send people to General Assembly and to regional gatherings, especially staff. Contributions of air miles and hotel vouchers by members could make this possible with lesser individual and UUCC costs.
- 2. Consolidate Changes and Transitions:** UUCC has gone through quite a few changes in recent years; fairly rapid turnover of settled, interim, and developmental ministers; changes in elected leadership, etc. Some members and perhaps some staff likely feel unsure as to the goals of UUCC now and how they are planned, and to what ends. This is not uncommon in busy, lively congregations, but it would do well to have the leaders discuss these matters with the congregation, to see if the goals/ends they have feel right to the stakeholders, and give people a clearer picture of desired end states, measures of effectiveness, and expected timelines for transitions and progress.
- 3. Develop a Stronger Stewardship Culture:** Nothing builds congregational confidence in the future like a successful budget drive and an environment of shared contributions. Consider it a requirement to have one, preferably two, successful budget drives on the books as you go forward. UUCC is not in a full stewardship crisis, but the gifts distribution profile, donation shortfalls, and stewardship elements discussed earlier in this report indicate a broader and deeper conversation is overdue.

Do not make this a focus just of the annual budget drive, but part of a continuing



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conversation all year long about the power of giving and the meaning of stewardship as part of being in community. Consider adult RE sessions around these themes, sermons throughout the year, suggested short readings (especially for leaders) and visitations by membership and stewardship teams with members to help them think about how they connect to UUCC with their time, their talents/labor, and their treasure. Being a member means doing as best we can in all three categories. Stewardship, as an information area and as a mechanism to contribute, deserves a prominent place in congregational life and in the various communications tools in use at UUCC.

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

Put serious time and resources into high quality visiting steward training and include a very high percentage of lay leaders in that pool of stewards. In regards to the Board, examine how well you are preparing Board members to be stewardship leaders, ensure Board members are consistent pledgers at whatever level they can support, and expect Board members to serve as Visiting Stewards.

The next annual budget drive is too close on the calendar to accomplish all these steps, but a good start can be made. The budget drive for 2016 is important for all the obvious reasons, and needs to be perceived to be successful and empowering; work on that campaign needs to be detailed, intentional, and underway a good 9 months early this time around. Get the budget drives right and a lot of other concerns will fall into place.

Two procedural recommendations in this area. One, relook the policy of not taking credit cards for contributions. The goal should be to make it easy for people to contribute in any way they choose. Consider a policy that says credit cards are not preferred, but are accepted and that members using credit cards are asked to increase those donations by 5% to cover the cost to UUCC in accepting credit cards; you are likely to find most card users are willing to do this.

Two, emphasize the importance of automatic payments for pledges. Members can do this through their own financial institutions or by authorizing UUCC to debit their accounts. Doing this greatly evens out cash flow for UUCC, takes the hassle out of recurring payments for the member, and of course, the member can stop such payments anytime on a moment's notice. Budget drives should encourage automatic payments and pledge cards should have a check box to confirm this is an auto payment pledge.



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4. Develop a “Push Not Pull” Cross Functional Communications Culture: UUCC is one busy congregation, not just in programs but in governance and relationship building. People need a balance of being included, informed, and consulted, but not overwhelmed. Good communications should be a deliberate focus area, not a byproduct, and one in which the level of satisfaction is regularly sampled.

No meeting should end without reference to the acronym WENK – “Who else needs to know?” It should be an explicit leadership function to ask that question and assign the responsibility to make that connection. When in doubt, share.

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

5. Get Moving on a Long Range Plan: A small team should be empowered to start and maintain a long range plan, developed with good congregational input. In recent years, the trend has moved away from traditional plans that ran for dozens of pages, developed over long months – plans that were often too complex and seldom read. Plans today are more often shorter, developed in less time, and have a limited number of clear priorities. Having such a plan and process will serve UUCC well and keep everyone thinking beyond the next few months.

6. Grow Your Endowment: The endowment is your “seed corn” for the future, and an excellent tool to help everyone think beyond the next year or two – and to commit accordingly. Give the endowment more visibility and interest, facilitate a legacy society (prominently recognized in your common areas and at the annual meeting), and aim to have an endowment 2-3 times your annual budget. There are excellent guidelines and tools to accomplish these goals in Wayne Clark’s book, *Beyond Fundraising*, and on the UUA website, under the CONGREGATIONAL MANAGEMENT/FINANCE tabs.

7. Look Deeper at Your Membership Dynamics: UUCC has quite a few visitors and while a good number become members, about the same number leave membership in a given year, leaving your numbers essentially unchanged over several years. This is not necessary a good nor a bad thing, but it is an unknown. I recommend developing a Back Door subgroup to the membership team to develop a process to know when people leave and to engage those willing to do so to ascertain why they left. Similarly, a focus on helping more repeat visitors transition to memberships should pay dividends. This is a very specific focus effort, different from simply welcoming



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visitors. Look at membership as a life cycle activity. The leadership should have as a priority helping the membership team add new members to its group. The membership committee would do well to invest time and effort in growing its information base and sharing it with the rest of the congregation: how many visitors have we had in the last year, how many returned, how many joined, how many members left and why (to the extent we can ascertain), and what skills and interests to our members share?

8. Ensure a Viable Process in Place to Resolve the Contentious Issues. The Agreement documents in place for how the Board members relate to each other and the one for the congregation at large are rather long and seem to have been written after a problem had occurred. If I were a member, I am not sure the current document would be something I would find useful in a time of agitation or conflict. Consider asking your regional staff to review your procedures and perhaps to offer a workshop for you or your cluster. The Southern Regional staff has some very strong expertise in this area and their resources are generally available to you at no costs.

VII. Proposed Time Lines and Implementing Selected Recommendations

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

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

JAN 2015 - MAR 2015 - As recommendations are accepted and adopted, establish and publish a calendar of events and deliverables so everyone knows the benchmarks, timelines, and goals along the way. Update it as progress is made. These need not be complicated projects and large numbers of new volunteers are not required. Use small, informal task forces to implement the recommendations beyond those specifically in the capital project.

JAN 2015 – JUN 2015: Complete the stewardship (as much as possible, given time available for this next drive), financial management, and other recommendations. Those that take longer than this should continue and be tracked until completed. Establish objectives and measures of success for each area early in the process. Consider a Stewardship Retreat for leaders and/or a Stewardship Saturday for interested members of the congregation who wish to learn more about stewardship as a part of ministry, as well as a Search for the Future activity.



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SEP 2015- JUN 2016: Plan, train for, and conduct an excellent annual budget drive that builds confidence, energizes the congregation, and improves stewardship income and distribution; this should be a major priority.

VIII. Consulting Options

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

The leadership is free to consider its choices for future action with full, some, or no consultant support, utilizing all or portions of the recommended consultant support noted in this report, and to ask for further information if needed to make those choices. If a consultant is requested, the option is yours to request that Bill return or that another consultant be made available.

Recommended consultant services are at Annex C.

IX. Additional Materials and Information: As we discussed throughout the weekend, I will provide under separate cover an extensive selection of guidelines, links, sample products, and recommended reading in stewardship, financial management, endowments, leader development, membership, volunteer support, and other areas we discussed during our time together. These will be provided in the next few days to the Minister, to the Administrator, to the visit point of contact (Buck O'Rear), and to key area leaders for further distribution as appropriate. A total of 16 samples, examples, links, etc. were discussed during the visit and will be provided.

X. Conclusions

It was a pleasure working with and meeting the leadership and so many members of UUCC. I am especially grateful for the opportunity to meet members at the Forum and the membership during/after Sunday services, as well as those who attended the leadership dinner on Friday. All of this informed my understanding of this unique community significantly. UUCC is an important part of the Greater Chattanooga community and it is vital to the quality of life of its members.

In short, there is much to celebrate, much potential to develop, and work to be completed. There is no reason UUCC cannot meet the goals it sets for itself. While there are some significant challenges, especially in stewardship, I saw no problems beyond the capacity of UUCC to handle. If I were a member of this congregation, there is much in evidence that would give me pleasure, inspiration, and hope. You have the capacity to be the congregation you wish to be.



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UCC has opportunities before it. The congregation has the leadership and the sense of community to make the right choices. The settling in of a developmental minister also provides opportunities for continued growth of the already strong lay leadership.

A realistic and complete planning process with clarity in your priorities will bring the membership where it decides it wants to be. Stay in community, be patient and trusting with each other, and celebrate your successes; you are up to the challenges and the opportunities.

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

William R. Clontz

William R. Clontz

UUA Congregational Stewardship Consultant

December 12, 2014

Annexes

Annex A: Visit Schedule

Annex B: Distribution of Annual Financial Commitments

Annex C: Recommended Consultant Services



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Annex A

Assessment Visit Schedule Bill Clontz, Stewardship Consultant. Unitarian Universalist Association

Friday, December 5

- 4 to 5:30 PM Meeting with Rev. Harrington, church staff
- 6 to 8:30 PM Working dinner with a cross section of leaders and members of the congregation. Review of the plans and goals for the Next Steps visit, discussions as to what is working well at UUCC, what challenges and concerns are in evidence, and thoughts on a possible capital improvements program. (12 attendees).

Saturday, December 6

- 8:30 to 9:15 AM Religious Education Team(s) (All ages)
- 9:30 to 10 AM Social Justice/Green Sanctuary Teams
- 10:15 to 11 AM Communications Team (web, newsletter)
- 11:15 to 12 AM Building/Facility and Landscaping Teams
- 12:15 to 1:30 PM Working Lunch with Board, Chairs Ministry Teams and Nominating Committee
- 1:45 to 2:30 PM Membership Committee and SGM
- 2:45 to 3:45 PM Stewardship and Stewardship Campaign Committee
- 4:00 to 5:15 PM Finance and Endowment
- 5:30 to 5:45 PM WOWSERS
- 5:45 to 6:15 PM OPEN

Sunday, December 7

- 9:30 to 10:30 AM Bill Clontz meets with Forum
- 10:45 to 12:00 Bill Clontz attends service, brief comments
- 12:00 to 12:45 Bill attends coffee hour, available to talk with anyone.
- 12:45 to 1:45 Close out meetings and initial back brief

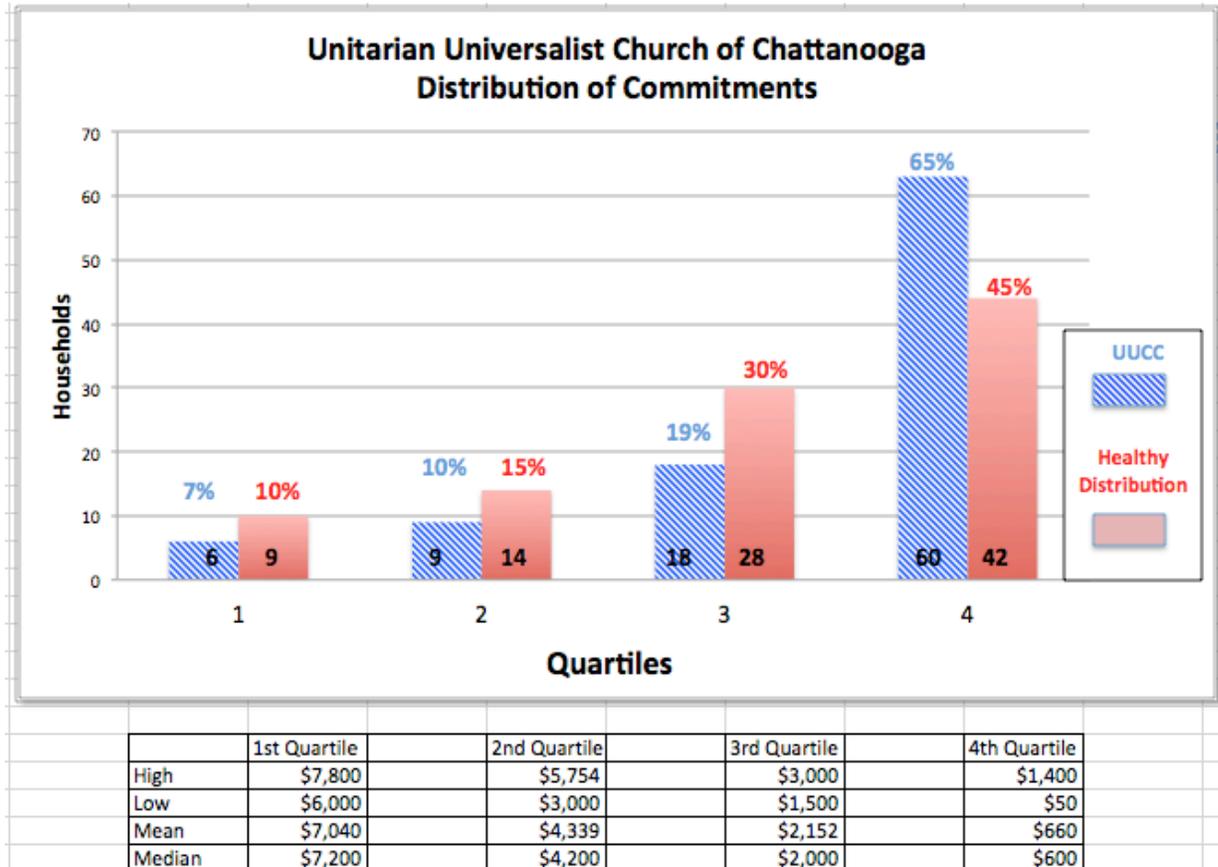
Two weeks after Visit (December 22): “No Later Than” target date for Next Steps Report with recommendations and schedules to the congregation to be provided by Bill.



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Annex B

Distribution of Annual Financial Commitments
UUCC Unitarian Universalist Church



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

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

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

How does it work? To create a quartile analysis: We add up the total *dollar amount* of pledges received in a year. We arrange all of the commitments in descending order, from largest to smallest. Next we add up the gifts, starting with largest and going down until we reach a total amount equalling the first quartile (25%) of our total dollars pledge amount. To determine the first quartile of giving, add the largest commitment to the next largest and continue until you reach 25 % of the total dollar commitments, on through all the quartiles.



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**Annex C
Prospective Consultant Support**

Task	Prospective Schedule	Consulting Time and Costs
<p>Support to 2016 Annual Budget Drive</p> <ul style="list-style-type: none"> • Assistance with campaign planning, materials, planning, organizing, recruiting, and communicating with the congregation about the budget drive and how it relates to the capital campaign. • ABD execution, conduct orientation (training) sessions for visiting stewards, and lessons learned analysis. 	<p>TBD; 6 - 9 Months Prior to Campaign</p> <p>Telephone/Skype/email/ Onsite</p> <p><i>A consultant provides increased assurance of a successful annual budget drive</i></p>	<p>1.0 day for pre-visit preparation and coordination; 2.0 days on site/travel, 2.0 days of online/phone support</p> <p>\$5,00, plus travel costs</p>
<p>Leaders Stewardship Retreat</p> <p style="text-align: center;">OR</p>	<p>TBD – 1st half of CY 2015</p> <p>Telephone/Skype/email/ Onsite</p>	<p>1.5 days for pre-visit preparation and coordination; 1.5 days on site /travel</p> <p>\$3,00 plus travel costs</p>
<p>Stewardship Saturday- A Congregational Workshop</p>	<p>TBD –CY 2015</p> <p>Telephone/Skype/email/ Onsite</p>	<p>1.5 days for pre-visit preparation and coordination; 1.5 days on site/travel</p> <p>\$3,00 plus travel costs</p>



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<p>Searching for the Future (SFTF)</p>	<p>Telephone/Skype/email/ Onsite</p>	<p>1.5 days for pre-visit preparation and coordination; 2.5 days on site/travel \$4,000 plus travel costs</p>
<p>End of Process Review</p> <ul style="list-style-type: none"> • A post-activity review with key leaders, establishing lessons learned and the way forward after all activities (SFTF, ABDs, stewardship workshops, or those elements from this list selected) are complete 	<p>Telephone/Skype/email/ Onsite</p>	<p>1.5 days on site/travel \$1,500 plus travel costs</p>

The consulting fees are \$1,000 per day. Travel costs are reimbursed at actual costs for travel (ground and air) and lodging; meals and incidentals are billed at the US Government rates for this location.

Charges are assessed only for time worked and for time spent one-way in transit. All contracts contain a not-to-exceed cap. The consultant would work with you through any engagements to manage your costs to assure you receive the greatest value.