

**Next Steps Weekend Report  
for First Unitarian Universalist Church in Columbia Missouri**

## RESEARCH, OBSERVATIONS and RECOMMENDATIONS

### I. Summary

Unitarian Universalist Church of Columbia Missouri (UUC) 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 capacity and readiness for a capital campaign. This *Next Steps Weekend*, conducted from December 6 to 8, 2019, engaged me to provide an independent, professional opinion on readiness and recommended next steps with the goal of a capital campaign to renovate, expand and improve your facility.

### II. Basic Data on the Congregation

Name and Mailing Address of Congregation	Unitarian Universalist Church of Columbia 2615 Shepard Blvd. Columbia, MO 65201 (314)821-0911
Website Address	<a href="https://uucomo.org/">https://uucomo.org/</a>
Minister	Rev. Molly Housh Gordon
Lay Leader Point of Contact	Patty Daus, Building Needs Task Force Chair
Number of Members	280
Average Sunday Attendance	160
Enrollment in Children's Faith Development	93
Annual Financial Commitments for 2019-20	\$308,129
Average Household Financial Commitment	\$2,000 from 154 households
Median Household Financial Commitment	\$1,260
Current Operating Budget	\$340,000
Mortgage or other Debt	No current debt
Endowment	\$228,000

#### UUC Mission:

*In the spirit of courageous love, we forge a community of radical welcome and deep connection that moves us together to heal the world.*

### **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 capital campaign to finance the improvement, renovation, and expansion of your spaces.

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 web site.

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

- Rev. Molly Housh Gordon, Minister
- Patty Daus, Building Needs Task Force Chair
- Rev. David Pyle, MidAmerica Region Congregational Life Lead and Primary contact for UUCC

### **IV. Initial Impressions, Commendations and Observations**

Prior to my visit, through the information gathered through conversations and documentation, I was anticipating visiting an engaged congregation that desires to expand its mission and vision throughout the community. One that needs an improved and expanded facility to meet its mission.

While on site, I met with your Minister, Board of Trustees, Staff, and various church groups to gather information in person about your congregation and its programs and to provide information about capital campaigns and giving. I met with 35 of your staff, leaders, members and friends over the course of the weekend. (Schedule in Appendix A). On the Sunday after the service, I delivered a presentation open to all. I have included the slide deck from the presentation with this report.

My findings are summarized in the following list of Blessings and Challenges and my detailed observations and recommendations further below.

#### **A. Blessings**

- You have a wonderful inspiring minister.

- You are deeply connected to your mission and vision.
- Your programming is strong and varied.
- You appear to be growing in both impact and numbers.
- Your leadership is creative and committed to the congregation.
- You nurture diverse spiritual need.
- Your campus is large and contains a beautiful natural wooded area.
- You love and accept each other's differences.

#### **B. Challenges**

- Your facility is not fully accessible.
- You have a small parking lot.
- Sunday mornings are crowded inside and outside of the sanctuary.
- You need/want to reduce your fossil fuel dependence and green your facility.
- You do not have adequate meeting spaces to accommodate the needs of the congregation or the community.
- There is limited calm, quiet sacred space indoors.

The UUCC congregation is healthy and well poised to expand its impact in the wider community. The facility needs to reflect the congregation's missional radical welcome and make it manifest in UUCC's built environment.

#### **V. Recommendations for Next Steps**

1. Gather robust data on congregational growth and giving.
2. Revisit what you need for your facility in light of new data and other information.
3. Reduce anxiety about talking about money.
4. Create a Strategic Financial Forecast.
5. Recruit a Capital Campaign Team and begin your journey toward a facility that more clearly reflects your mission and your values.

#### **RECOMMENDATION #1**

##### **Check your data so you can see how you are growing.**

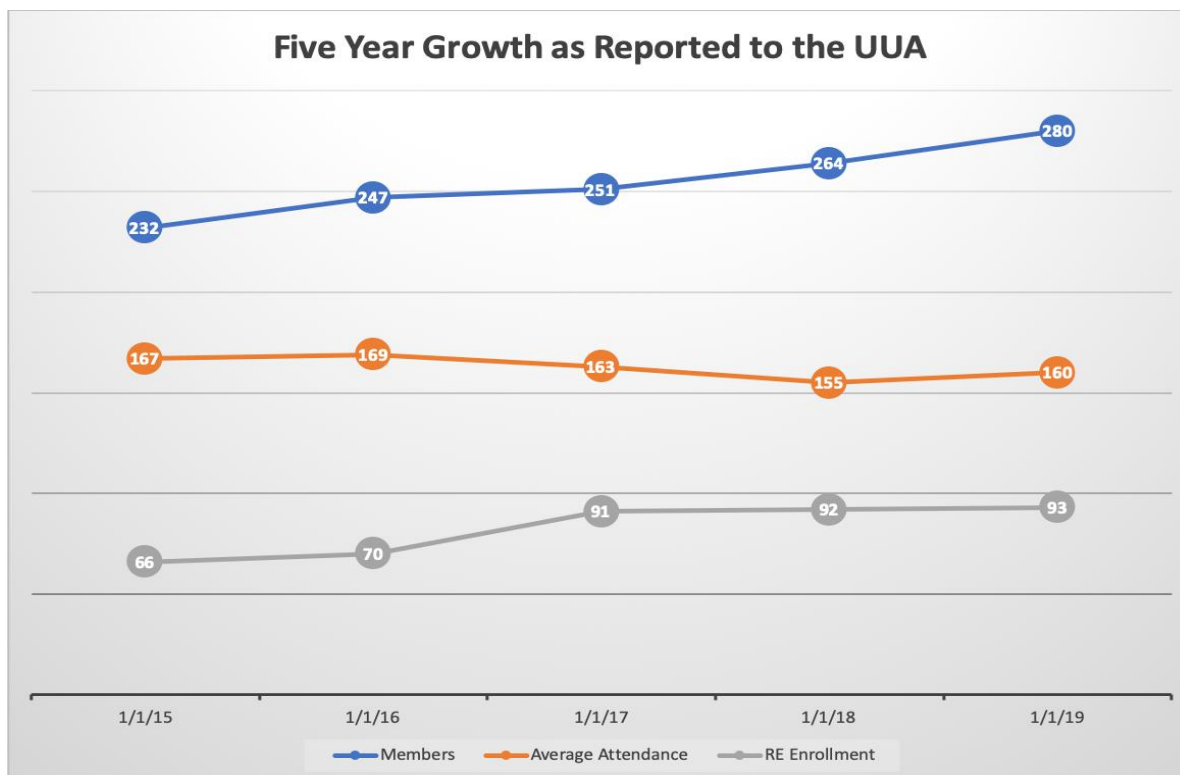
When I first looked at your data, it told me a story of membership growth but not Sunday morning attendance growth as demonstrated on the chart below. When I connected that data story with your draft building plan, submitted by the architects, which is a plan for making your improvements in two phases. And it included in Phase 2, the expansion of your sanctuary, I thought that you may need to expand your sanctuary sooner rather than later.

Generally, data showing growth in membership without a coordinating growth in Sunday morning attendance suggests there is a problem with the facility having enough space for people to feel comfortable on Sunday morning. That can be due to sanctuary size, parking spaces or other constraints that make people feel less welcome Sunday mornings.

Phasing your building requires a great deal of time. Generally a significant capital campaign takes three to five years and one doesn't want to conduct another one very soon after the first. So Phase 2 of a building plan often doesn't happen for ten years after the beginning of

the Phase 1 part. You seem to need a larger sanctuary sooner than ten years from the launch of your capital campaign.

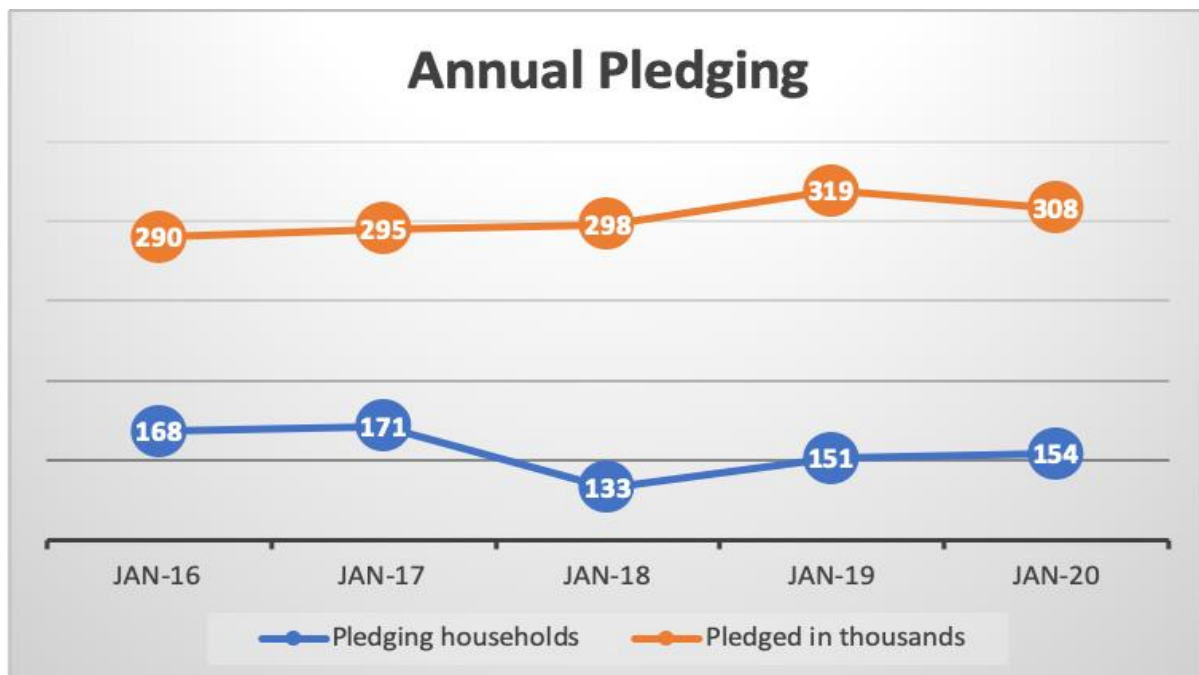
Note that the source of my membership and Sunday attendance data was the annual reporting to the UUA which is stored in the UUA Congregational Database.



During one of my meetings on site, as I was discussing my observation that you are growing in membership but not Sunday morning attendance, a wise member of the congregation suggested it was possible that my data may be incorrect.

I had other data sourced directly from your congregation, so I cross checked the numbers from the UUA Congregational Database on membership and attendance with data sourced from you about annual pledge totals and number of pledging households. See chart below. The two datasets should share similar trends. But the data on number of pledging households and total giving told a different story from the UUA data. It showed no growth or slight decline. The number of pledging households is at UUCA is not growing.

This does not *necessarily* mean that your membership is not growing, but it does mean you need to take a more careful look at all of these different data points to figure out what is happening. It's possible you're not communicating effectively with new people about pledging. Regardless of the reasons for these differences in trends, it's important for you to know and be as sure as you can be about your data as you make decisions about the needs for your facility.



I recommend that you check your internal data carefully to see clearly what is actually happening. This is important to your decision-making about setting priorities for your facility.

I highly recommend you create a chart of information from the past five to seven years including the following data from internal sources:

- Number of members
- Sunday Service attendance
- Sunday morning attendance (all people in and outside of the service, including RE)
- Number of pledging households
- RE enrollment

This data will allow you to see more clearly what is happening in terms of membership, attendance and growth. You may find you want to include other data points as well, if you have more information available. This could include information on facility use such as number of meetings in the space during each week or month, or number of small groups, classes or participants in various activities.

Note that the Building Needs Task Force (BNTF) Report, updated in November 2018, contains some very useful information on attendance already and does an excellent job of cautiously predicting growth and needs in the next five to ten years.

**RECOMMENDATION #2****Revisit what you need and want.**

Your mission calls you to “forge a community of radical welcome”. The BNTF report predicts a modestly increased membership at UUCC over the course of the next ten years. It states “340-350 members in ten years is a projection in which we feel confident.” The report also conveniently calculates average Sunday attendance as a percentage of membership. From 2013 to 2017 Sunday service attendance ranged from 40% to 47% of membership. What that tells me is that in 10 years, (or sooner) when you have a membership of 350, you will need to accommodate, on average, 44% of membership on any given Sunday. 44% of 350 is 154 people. Generally, the advice to congregations is that you should be only 80% full on any given Sunday, if new people are to feel there is adequate space for them. If 154 in attendance were to equal 80% of the capacity of the sanctuary (the welcoming number), then you would need a sanctuary that could accommodate approximately 193 people.

**Seats in the Sanctuary:** During my visit, your sanctuary contained approximately 130 seats. I was told that it could accommodate up to 148 seats if it contained the maximum number of seats possible. According to the 80% rule you currently have room for a single Sunday service attendance of 104 people. Interestingly enough your average Sunday attendance over the past several years (see the BNTF report) seems to have topped out at about that number. Note that the numbers for Sunday attendance in the growth chart above include all people in the building on a Sunday, including the Forum, RE attendance and teachers etc. The full Sunday attendance numbers are considerably larger than the Sunday service attendance by itself. As I understand it, the BNTF report numbers are for the Sunday service attendance. I do not know when the count is taken, but you need to have the capacity be at the beginning of the service when everyone is there – before children and teachers head to the classrooms. That’s the time that new people will be looking for seats!

**Parking:** Aside from seats in the sanctuary, the next most common facilities related inhibitor of growth is the size of the parking lot. It is generally recommended that there be a parking space for each 1.5 to 2.5 adult church attendees on a Sunday. Your parking lot is woefully small for your Sunday attendance. It currently contains a total capacity of 43 cars including 4 accessible spaces. The BNTF report suggests that your lot size allows you to increase your on-site parking to accommodate 60 to 80 cars without cutting valuable trees. It was not clear to me whether the architects included increased parking in their current plan. I only saw resurfacing existing parking in their cost estimates.

In my conversations while I was on-site a number of people discussed possibilities around increasing awareness, and ease of use of the parking lot at the school across the street. There was differing options and lack of clarity around what the deal was with the school. Clarifying the rules for use of the lot across the street and educating the congregation about all available parking is important to your growth and mission.

**Opportunities for Congregational Input:** There are at least two kinds of ways to assess your needs, one is to engage the congregation in a process through which they can provide input

on needs. The other is analyzing data available and thinking about growth and needs in terms of mission fulfillment.

Your congregation has done an excellent job in the process of gathering input from the congregation thus far. The BNTF gathered input and the session with the architects also provided opportunity to weigh in on design and desires for your facility. My onsite visit indicates that the congregation would benefit from the BNTF providing more opportunities for congregational input and some additional assessment of the data with consideration around your mission.

I recommend that the BNTF share the draft plan the architects submitted with the members of the congregation, and their thoughts about growth and mission in light of any new data-based information.

I've attached a template for a structured one-hour input session for interested members of the congregation. I recommend you offer a minimum of two different convenient time slots for such sessions and invite anyone interested to attend. The data you collect from these sessions may match the data the BNTF and the architects have already collected but it also may include some new information. Post the results of the new sessions on your website and consider the interests and needs of the congregation as they stand now.

**Mission Fulfillment:** Be sure to ask yourselves the question: What would be the facilities needs if we were fully living our mission? I believe that "a community of radical welcome and deep connection" has some specific needs for in terms of facilities. The obvious is to be fully accessible, which you have noticed and are including in your plans. Continue to listen to the input from your task force on accessibility. Their recommendations and consideration are creative and bold. The less obvious is how to determine and allow for the growth that seems inevitable should you achieve your mission related goals. And that includes things like space in the sanctuary and parking spaces. While a congregation can never be certain that it will grow in membership and attendance, you can be fairly certain that you won't grow, if you don't provide space for people to feel welcome.

### **RECOMMENDATION #3**

#### **Reduce anxiety around money.**

Money is probably the most taboo subject in our society today. We talk about sex and politics and medical issues but not about money. Our fear and shame around money do us a disservice. It is important for each of us to understand that money is simply one of the tools we can use to create value in our lives and our world. It does not measure personal success or personal value. Love can be the measure of our success. Edgar Villanueva, author of *Decolonizing Wealth* asks the provocative question, "What if we could liberate money to be used as a tool of love?"

I believe we need to be able to talk about money without shame and anxiety in order to use it in the best possible ways to create a just and sustainable world. I recommend you begin to reduce anxiety around money through small group ministry or classes to share money stories. When we start sharing our personal money stories, we can begin to break out of our

collective culture of secrecy, shame, fear and anxiety around money and build paths to connection and possibility.

It's great to start with foundational and personal topics to help us understand our own and each other's' early experiences around money. A small group session might use a prompt such as the following: What was your first bank account? Can you remember a particularly important time when you saved money? Did your family talk about money? Was that a positive or negative experience? Did you ever feel like you had too much money? Why? What was a memorable experience of giving money to someone?

Once we're talking about our personal money stories it's easier to discuss our congregational money stories. We each have our own stories in our heads about our congregations. What would happen if you asked congregation members: What is the UCC money story? What would they tell you? What do you wish they would tell you?

I've attached a sheet on sharing money stories developed by the UUA.

#### **RECOMMENDATION #4**

##### **Create a financial forecast.**

Together with developing a building plan for your facilities to fulfill your mission, you need to develop a strategic financial forecast. When you grow in membership and/or facilities, your financial needs change. Looking into the future of your congregational finances in terms of your growth and your mission will help you understand where you are going and what the resources you will need along the way. I've attached a useful financial planning tool for developing a strategic five-year financial plan. This includes making membership, giving, staffing, and capital needs predictions for your future.

In the attached Strategic Financial Plan Template, feel free to create more tabs that roll up into the categories like staffing or other sources of income. This template is a tool intended to provoke thinking about your annual and capital needs over time. What staffing will you need in five years? What do you think your average annual pledge will be? Do you have major maintenance needs coming up?

I've also attached a sample Maintenance Reserve Spreadsheet showing how you might anticipate major capital needs to renovate and maintain your facilities over the years.

Sharing these tools can be useful to your finance team, Board and staff. If you need help and guidance making a strategic financial plan, I am available to consult with you on that work.

#### **RECOMMENDATION #5**

##### **Recruit a capital campaign team.**

It's important to understand that your Building Needs Task Force is not a capital campaign team. You need to recruit a separate team for the campaign itself. While very much in collaboration with the BNTF, the campaign team has a separate set of tasks from the building team. Both teams are vital to your success.

You are planning for a combined annual pledge drive and capital campaign in the early spring of 2021, about a year from now. Ideally you would have the capital campaign team in place by summer 2020. It might be best to recruit the team this coming spring, before Rev.



Molly goes on her sabbatical so the team can begin its work while she's away. A team might be composed of the follow:

- a. Campaign co-chairs
- b. Leadership gifts co-chairs
- c. Fellowship event co-chairs
- d. General gifts co-chairs
- e. Publications co-chairs
- f. Communications Publicity co-chairs
- g. Campaign treasurer (working with bookkeeper &/or office stay or lay leader)
- h. Follow-up co-chairs
- i. Financial monitoring co-chairs

I've attached a Combined Campaign To Do List for your planning and information.

### **RECOMMENDATIONS IN SUMMARY**

Check your data so you can see how or if you are growing.

- Number of members
- Sunday Service attendance
- Sunday morning attendance (all people in and outside of the service, including RE)
- Number of pledging households
- RE enrollment

Revisit what you need and want.

- Seats in the sanctuary
- Parking
- Opportunities for Congregational input
- Mission fulfillment

Reduce anxiety around money.

- Share your money stories

Create a Financial Forecast

Recruit a Capital Campaign Team

## **VI Possible Timeline**

### **Winter/Spring 2020**

- Data check about growth and numbers
- Work with architects on needed revisions in possibilities and costs
- Annual Budget Drive
- Develop Financial Forecast
- Host more ways for people to give input on what they'd like to see happen
- Summer 2020
- Rev. Molly sabbatical
- Work on Campaign/Building plans
- Money story sessions

### **Fall 2020**

- Rev. Molly returns
- Building plans gelled
- Educate the congregation about the building plans and campaign process
- Feasibility Study invitation list
- Money story sessions

### **November 2020**

- Presidential election VOTE!!!!
- Invite people to Feasibility Study

### **December 2020**

- Feasibility Study and results

### **Winter/Spring 2021**

#### **January 2021**

- Hone campaign goal
- Campaign strategy finalized
- Congregational vote on campaign

#### **February 2021**

- Visiting Steward training
- Quiet/leadership phase of campaign
- March/April
- Launch dual campaign – Capital and Annual and conduct stewardship visits



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Columbia MO December 2019

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 opportunity to serve you as a “Sacred Outsider” and to provide my reflections and recommendations on your challenges and opportunities. You are beautiful! I hope I may continue to be of value to you as you traverse the path toward a capital campaign.

With gratitude for all you do.

Kind regards,

A handwritten signature in black ink that reads "Rachel".

Rachel Maxwell

Stewardship Consultant, Stewardship for Us  
425.231.8313

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attachments:

- Learning Session for Input
- Your Money Story Worksheet
- Strategic Financial Plan Template for Congregations S4Us
- Sample Maintenance Reserve Spreadsheet
- Combined Campaign To Do List
- NSW Presentation UUCC

cc: Rev. Molly Housh Gordon , Minister  
Patty Daus, Building Needs Task Force Chair  
Mindy Mcpherson, Board Chair  
Rev. David Pyle, UUA MidAmerica Region, Lead, and current primary contact

APPENDIX A

**Next Steps Weekend Schedule  
for Unitarian Universalist Church of Columbia, MO**

**December 6 to 8, 2019**

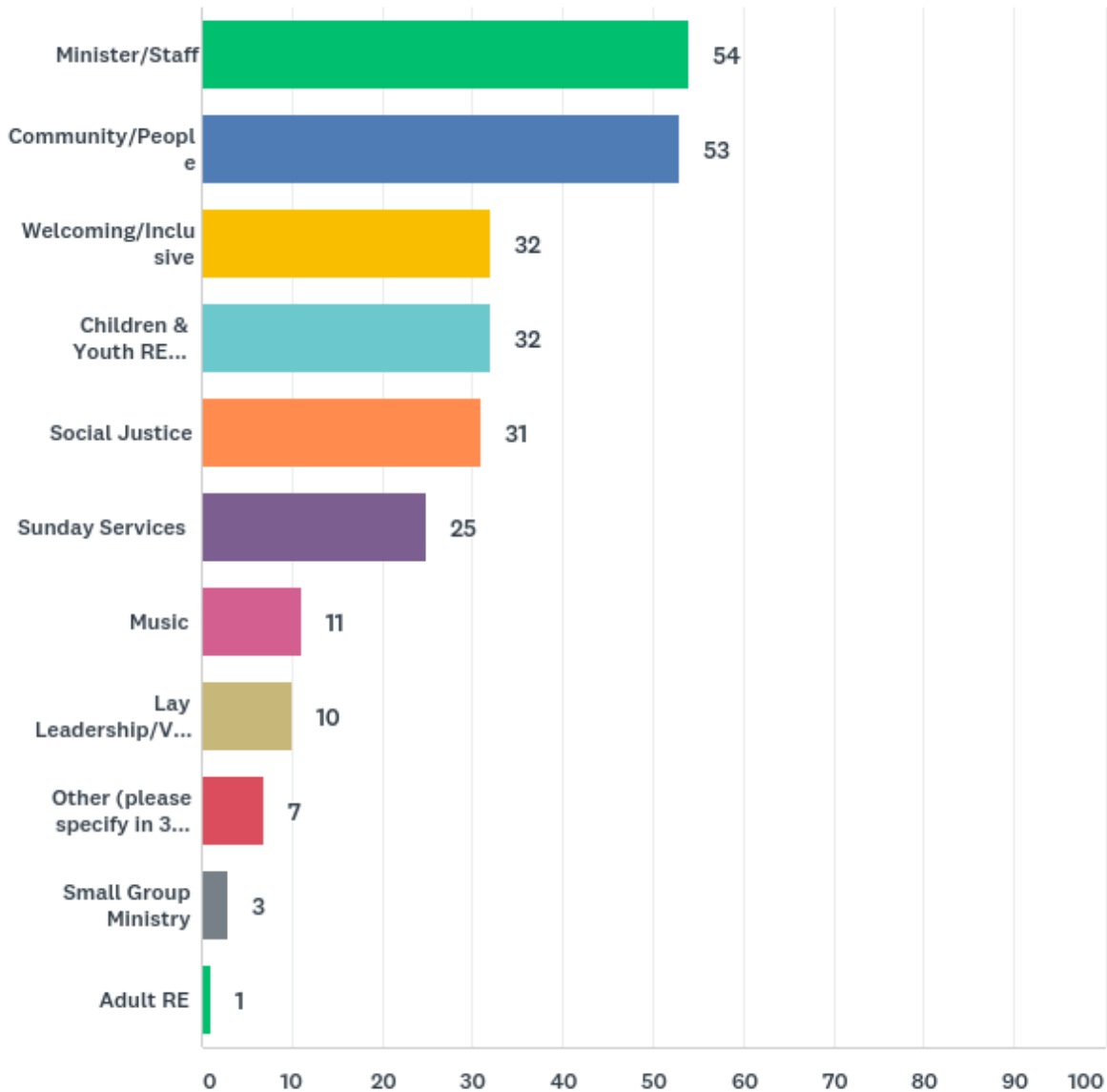
<b>FRIDAY</b>	
<b>1:00 PM</b>	Individual meeting and lunch with Rev. Molly Housh Gordon
<b>6:00 PM</b>	Dinner meeting with Board of Trustees & Minister
<b>SATURDAY</b>	
<b>8:30 AM</b>	Buildings and Grounds Tour
<b>9:00 AM</b>	Meeting with Staff
<b>10:00 AM</b>	Forum and Meditation Group
<b>11:00 AM</b>	Building Needs Task Force
<b>12:00 PM</b>	Lunch Break
<b>12:30 PM</b>	Stewardship, Treasurer, Endowment
<b>1:30 PM</b>	Children & Adult Religious Education
<b>2:30 PM</b>	Social Justice Teams (AIM, Green Sanctuary, Social Action, Sanctuary)
<b>3:30 PM</b>	Membership Teams (Welcoming, Member Connect, Chalice Circles)
<b>4:30 PM</b>	Sunday Services Teams (Worship Associates, Choir, Usher & Teller)
<b>SUNDAY</b>	
<b>12:00 PM</b>	Congregational Presentation – Open to all
<b>1:00 PM</b>	Board and Building Needs Task Force Debrief

APPENDIX B

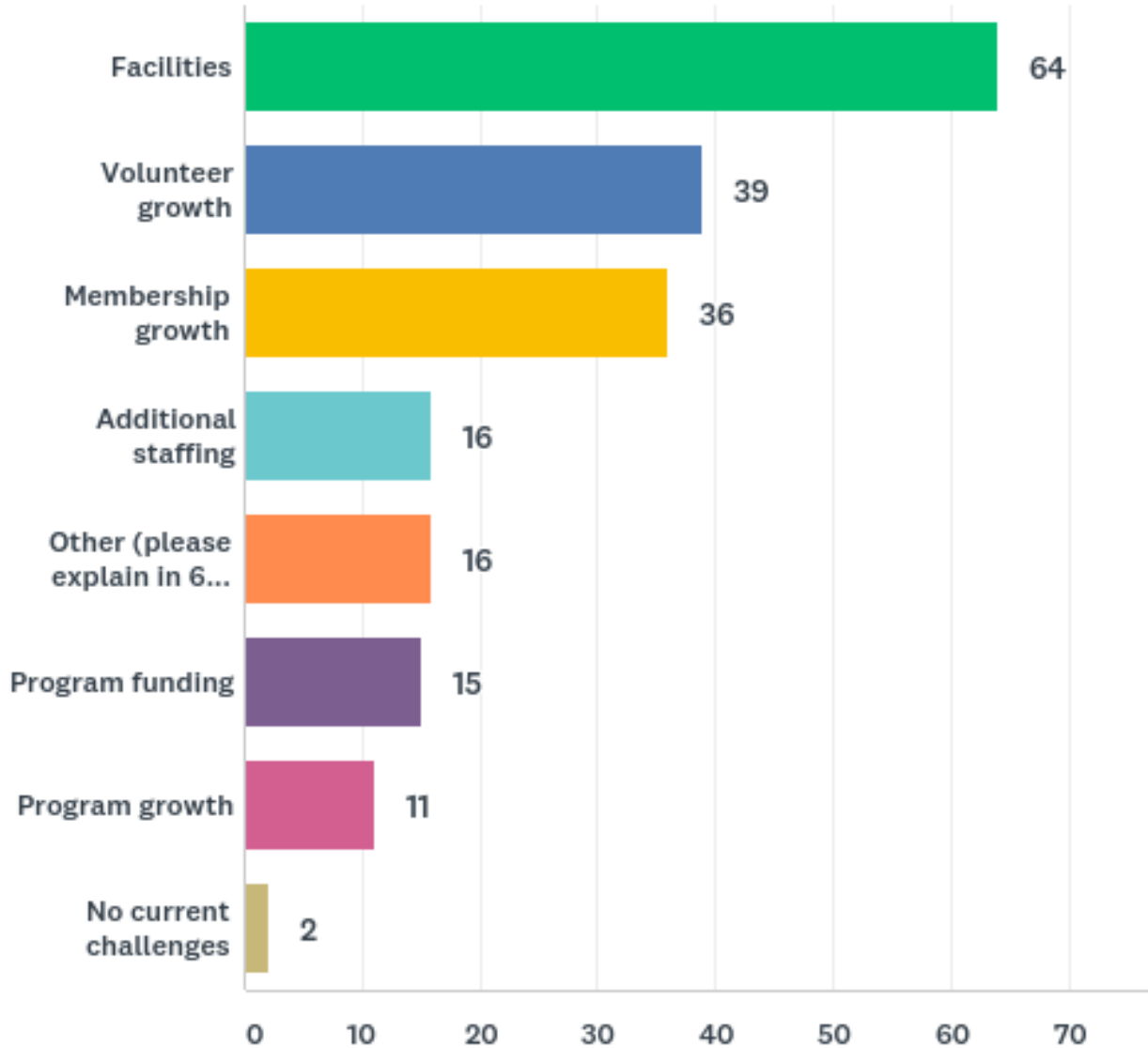
**Results of Online Survey**

Eighty-six surveys were completed by members and friends of UCC before the survey was closed on December 15, 2019.

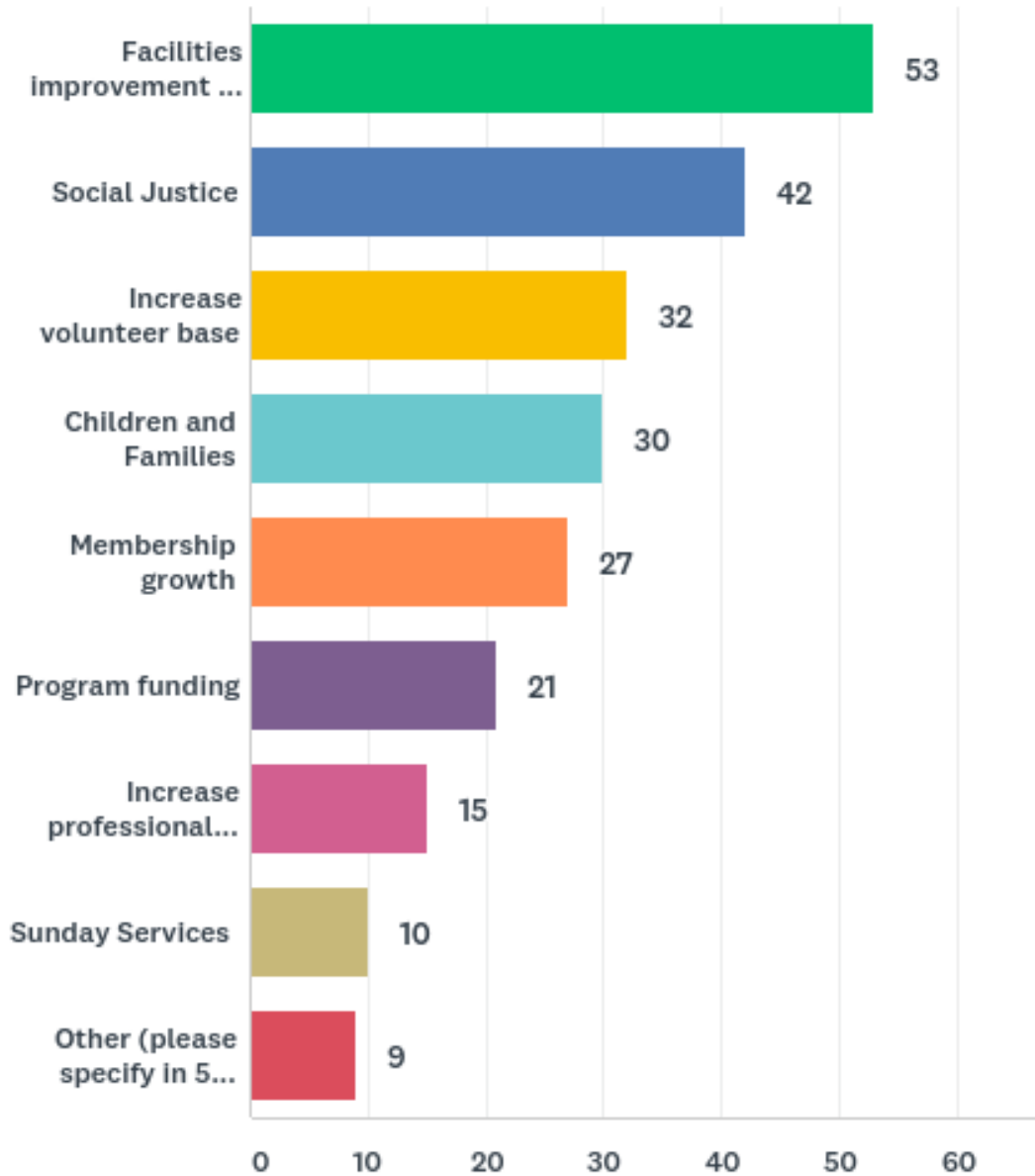
**What are the 3 greatest strengths of UCC?**



## Are there any challenges UUCC needs to address in the next five years?



## What are the 3 top priorities for UUCC to further our mission going forward?



### *Other* responses:

2 – Elevator

Maintaining & developing depth of commitment & connection

Equal focus on member retention and others across the lifespan (not just children/families)

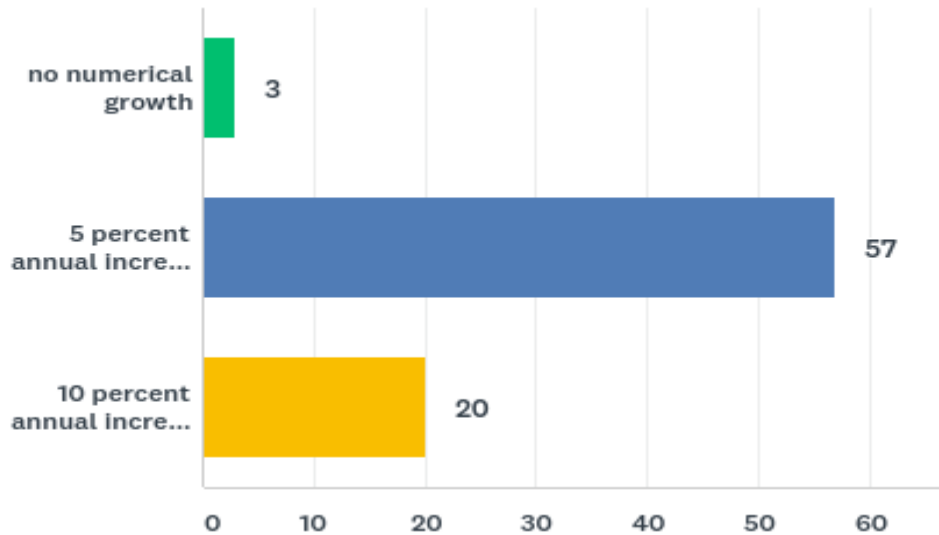
Improve and maintain current facility not necessarily expand

Change committee structures to include more diverse age groups

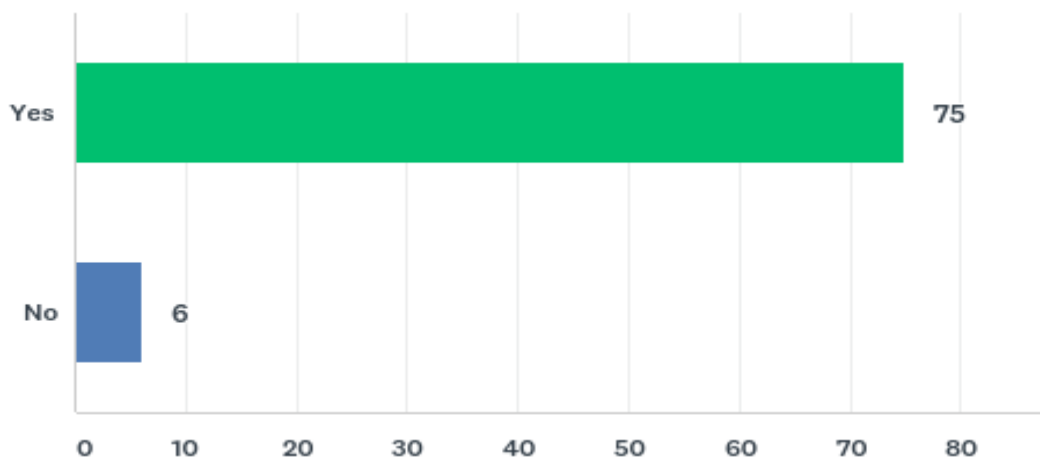
Have more gatherings after church to get to know one another (like monthly potlucks)

Community presence and involvement

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



**If a Capital Campaign is held to further the mission of UCC by renovating and improving our building, and pledges can be paid over a 3-year period, I/we would contribute to a future Capital Campaign.**



There were 12 comments on this question. See below for direct transcript of comments:

Only for elevator, carpet & needed repairs
Not sure--depends on how the funds are to be used.
But I can't give a lot more.



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I live on a fixed income and am giving as much as I can.
Our church continues to attract positive attention. We are getting out in the community and becoming more apart of causes we believe in as UUC members. As we seek young families and couples, we must look at our building. What does our playground look like. Do we have a large enough kitchen with hot water that does not run out. Do we have enough space to conduct a service and then go into another room for meals. Are the classrooms downstairs large enough. How are our handicapped facilities. Those are some of the things that need to be considered, as well as staff, programs, etc.
Only if it includes greater physical accessibility/elevator.
I have been a very active member before my children and until my children left for collage. Now I attend very regularly the gentle yoga classes. I find that is meeting my spiritual needs. I would like to see a yoga/gym space if the church was going to expand. I believe in UUCC and feel the church does not always see providing space for this community yoga class as a ministry. I feel like it is. And it meets my current spiritual needs.
In a small way
Annual growth rate: I think growth will continue to be organic as long as we live our mission. Less concerned about numbers than quality of the experience for all who enter the church.
unknown. recent drastic drop in income
We are IN - and will do all we can to help support UUCC's mission.
Not sure - would contribute some but on fixed income and other priorities. I'm not sure a capital campaign is needed as much as rehab and refreshing. We probably need to better accommodate disabled and find a way to help let others know we are here, what we represent, and find a way to get others to the church if they do not have transportation.