

ASSESSMENT VISIT REPORT

Name of Congregation: Unitarian Universalist Church of the Lehigh Valley
424 Center Street
Bethlehem, PA 18018-6019
610.866.7652
www.uuclvpa.org

Minister: The Reverend Don Garrett
minister@uuclvpa.org
610.533.2000

President: Susan Weber
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Contact Person: Susan Weber

Number of Members: 212
Annual Pledge Income: \$237,732
Average Pledge: \$1,617
Mortgage: \$270,732
Member Notes: \$122,924

Number of Pledge Units: 147
Annual Budget: \$315,500
Median Pledge: \$840

Operating Reserves: \$51,852

Endowment Fund: \$63,911

Nature of Annual Stewardship Campaign: Wine and cheese parties in homes with some personal conversations and on-line pledging year around

Date and Purpose of Last Capital Campaign: Last capital campaign was in 1995 to purchase the current building at 424 Center Street.

Status of Vision and Mission Statement and Strategic Plan: New Values and Mission statements were adopted in June 2012. An updated strategic plan is in place and formed the basis for selecting the building projects to be included in the capital campaign.

Actions to Increase Inclusivity: Over 10 years ago, UUCLV created HAVEN for gay, lesbian, bisexual, transgendered, and questioning young people between 14 and 20 years of age; it meets weekly with trained adult facilitators. UUCLV is a Welcoming Congregation.

UUCLV is a part of the Community Emergency Shelter Program, hosting homeless people at the church each Wednesday between mid-December and the end of March.

UUA Consultants in Last Three Years: The Reverend Richard Speck, Joseph Priestley District Executive, conducted a start up seminar in the fall of 2010.

Proposed Project and Estimated Cost: Major deferred maintenance and accessibility improvements constitute the bulk of the project. Estimated cost is \$408,000 and \$526,000.

Steps Taken to Prepare for This Project: The Long Range Planning Committee produced the Fact Finding Report Concerning the Existing Church Building which concluded the Investment in the current property was more efficient and affordable than relocation to an existing building or building a new church. It also produced a list of building projects with cost estimates and priorities to them noted above.

In addition, the member notes were sold several years ago to pay for the repair of the roof over the religious education facilities. Some have been redeemed but generally the church has only paid interest from the annual budget. These notes, currently amounting to \$122,924, come due in two years. The proceeds of the capital campaign will be used to pay off these notes so the total amount projected is between \$531,000 and \$649,000.

Recommendations: In December 2005, I made an assessment visit to UUCLV while the church was in a period of turmoil during which two staff members left and the president and vice president resigned from their offices and the church. The Annual Budget Drive fell short; the evaluation of it showed that too few persons were involved, it lacked publicity, had little support from the Board of Trustees and minister, and “a general lack of commitment on the part of the members.”

I recommended that the church plan on a capital campaign in 2007 in conjunction with the Annual Drive provided the following items were accomplished. It has taken a longer period of time but almost all have been accomplished. See comments in parentheses.

Complete the healing work that had begun with the Right Relations Task Force. *(Done)*

Return to a person-to-person stewardship campaign in the spring of 2006 with the goal of fully funding the operational needs of the church. *Budget adequately funded with surplus in 2011-12 and pledges above goal in 2012-13; however, person-to-person contact was limited.)*

Increase the operating reserve funds to cover two months operating expenses. *(Done)*

Create a new vision and mission statement. *(Done)*

Create a membership development plan. *(not attached to strategic plan)*

Develop a program statement that validates the proposed building projects. *(done with cost estimates)*

A new minister was settled in the fall of 2010. He has spent time making sure the healing has taken place before the church renewed its efforts for a capital campaign. He seems to have been successful in that effort. I experienced a different feeling about the congregation on this trip almost seven years later.

I recommended that a capital campaign be held in conjunction with the annual budget drive in the spring of 2013. I suggested a goal of \$700,000, based on the possibility of raising three times the current annual pledge in capital pledges paid over a three year period. That figure allows for funding all the proposed projects as well as the costs of the campaign and anticipates a five percent shortfall on the pledges.

I also recommend that the Board appoint a seven person steering committee to manage the combined campaign. See attachment for details. (At the planning meeting Saturday afternoon, four of the seven positions were filled by people who attended and volunteered. I take that development as another sign of congregational healing.) The group also committed to person-to person contacts for the campaign.

Consulting needs. The consulting needs are estimated at 12.5 days and are shown on the attached tentative schedule. A special congregational meeting is planned for November 11, 2102 where a motion to approve the capital campaign with a goal of \$700,000, subject to a satisfactory financial confirmation study in January 2013, will be presented.

David L. Rickard
UUA Congregational Stewardship Consultant
Drafted September 26, 2012

Unitarian Universalist Church of THE Lehigh valley
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Bethlehem, PA 18018-6019

ORGANIZING FOR THE COMBINED CAMPAIGN

Combining a capital fund drive with an annual budget drive can be a very efficient way in which to accomplish two objectives: to fund the annual operating needs and to fund major capital expenditures. Doing them together offers several advantages: 1) R\recruit visiting stewards once, not twice; 2) obtain both pledges during the same visit; 3) discourage people from reducing the operating pledge in order to pledge to the capital campaign; and 4) avoid duplicating efforts.

A Combined Campaign requires sustained effort from seven people. Each has an assigned portfolio as noted below. Except for the Campaign, Leadership, and General Associate Chairs, each should form a small committee to assist in discharging the responsibilities. The seven form a Steering Committee that will make the decisions concerning the campaign.

CAMPAIGN CHAIR. This person serves as the convenor and overall director of the Combined Campaign. Ideally, she or he is recognized as a leader in the congregation and has the respect of the members.

LEADERSHIP GIFTS CHAIR. This person is responsible for obtaining the financial commitments of those members of the church with the greatest potential for financial support including recruiting the necessary visiting stewards for this portion of the campaign. With the help of the Financial Management Chair, she/he monitors the performance of the visiting stewards and follows up as necessary. He/she will work with the Hospitality Chair to plan the Leadership Reception. She/he should be chosen from among the top contributors in the church, but must have good organizational and interpersonal skills.

GENERAL GIFTS CHAIR. This person leads the general portion of the Combined Campaign. She/he is responsible for recruiting the team captains and visiting stewards for this part of the campaign. With the help of the Financial Management Chair, this person monitors the performance of the visiting stewards and encourages them to complete their assignments on a timely basis... This individual should be familiar with the church, its history, and its members. Good interpersonal and organizational skills are important.

PUBLICITY AND EDUCATION CHAIR. This person prepares the newsletter articles, drafts letters to the congregation, prepares the campaign brochures, and helps train the visiting stewards. The person selected for this assignment must be a good writer with knowledge of the church and its membership.

HOSPITALITY CHAIR. This person arranges for the Kickoff Event (generally a congregational dinner), recruits the necessary hosts/hostesses, and plans the evening's entertainment. He/she helps plan the Leadership Reception. This individual must be well organized and knowledgeable of the church membership. She/he should also be skilled in interpersonal relations.

FINANCIAL MANAGEMENT CHAIR. This person is responsible for the record-keeping and initial collection part of the canvass. He/she establishes a system to issue and track financial commitment forms and to acknowledge all financial commitments received. This individual also monitors the performance of the visiting stewards and lets the appropriate chair know when no reports have been received from a visiting steward. She/he also works with the Treasurer to assure that the pledge recording system will be able to accommodate the capital pledges over the three-year payment period. The individual also keeps track of expenses of the campaign and certifies bills to the Treasurer for payment. The best person for this job is one who can handle details and perform in a timely manner.

CONTINUING CAMPAIGN CHAIR. This person is responsible for contacting those members and friends who were not contacted during the initial campaign, including new members. He/she will also monitor the collection process and follow-up with financial commitments that are in arrears. This individual needs to be one who functions well with detail. A small committee must be formed to assist with the follow-up calls.

David L. Rickard
UUA Congregational Stewardship Consultant
September 24, 2012

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TENTATIVE SCHEDULE FOR A COMBINED CAMPAIGN

After the Assessment Workshop on September 22, 2012, a group of leaders met to review the findings of the workshop. The consensus of the group was that the Church should undertake a combined campaign for support for the Annual Budget Drive and a Capital Campaign to fund the projects identified in the strategic planning process. What follows is a tentative schedule for such a combined campaign with the number of consulting days noted in parentheses. The consulting support is estimated at 12.5 days at an inclusive cost of \$1,320 per day or a total of \$16,500.

2012

- 10/15 Complete recruitment of combined campaign steering committee.
- 11/11 Congregational meeting to authorize a capital fund drive in the spring with goal of \$700,000, subject to satisfactory findings from the financial confirmation study.
- 11/16-18 Consultant visit to work with Steering Committee to establish guidelines for the campaign, review responsibilities for each member of the committee, and set plans for selecting persons to be interviewed in the financial confirmation study. (1.5 days)

2013

- 1/16-21 Consultant conducts 30 interviews for the financial confirmation study and submits written report within 10 days after completion with oral report of tentative findings for the steering committee and the Board on Monday, January 21. (7.0 days)
- 3/2 Consultant trains visiting stewards for the Leadership portion of the campaign. (1.25 days)
Leadership Reception.
- 3/3-16 Leadership campaign.
- 3/16 Kickoff Event
- 3/16 Consulting trains visiting stewards for the general portion of the campaign. (1.5 days)
- 3/16-4/20 General portion of campaign.

- 4/27 Consultant visit to evaluate the campaign results and help plan next steps.
(1.25 days)
- 6/9 Annual meeting of the congregation is asked to adopt an operating budget
for 2013-14 and to authorize expenditures from the capital campaign
proceeds.

David L. Rickard
UUA Congregational Stewardship Consultant
September 22, 2012
Amended: 9/24/12