

368 Rebel Circle, #446  
Dillard, GA 30537-2796  
March 7, 2005

Howard McMahan, President  
Westside Unitarian Universalist Church  
3600 Lawndale Avenue  
Ft. Worth, TX 76133-3019

Dear Howard,

**Nothing could have possibly prepared me for your phone call this morning, explaining the over night burning of your church. I feel so badly for all of you. Such losses have such an impact on people. That fact that it was leased space somewhat lessens the pain. Know that I will be thinking about you as a congregation and the many of you I have now gotten to know as individuals.**

I appreciate all of the efforts that went into making this past weekend's Assessment Visit possible. You and others were just great in getting me prepared to work with you and your people. I was extremely impressed with the turnout of 51 people attending at least some of the workshop. It speaks volumes to your process for calling people if they didn't respond and your people's commitment to the Church! Furthermore, the entire group exhibited incredible energy. I was impressed with their patience for the process and their attention through all that we did together.

***In assessing who you are, I see a congregation that I hope fully understands that your cup is well more than half-full:***

- ***Your membership growth, after some stagnation in the early part of this decade has been solid. You seem to be primed to grow more.***
- ***There appears to be good energy around Russell becoming your minister for one Sunday per month.***
- ***Those present at the workshop understood the need for financial stability wanted to have your OWN land/building(s), and wanted more members.***
- ***When asked specifically about the minister question, 32 of 34 indicated they wanted a minister, with 24 of them saying full-time and 16 part-time.***
- ***I felt there was confidence that you could grow your congregation while looking at the issues that I suggested you examine.***

In the immediate months ahead and likely for the next 2-3 years I envision that you will have many challenges and adventures as you determine your dreams for your congregation of the future and develop a plan to enable it to become a reality. Involve the congregation when their input is needed and most often this will first require education so that they can have informed opinions on the options in front of them.

I see the Board's role as being to provide strong leadership, with clear direction, logical explanations and a road map that the congregation can understand. It is very important to establish strong committees to do much of the work in planning for the future. I encourage the Board to empower the committees to do the needed jobs and provide them with the necessary resources for the tasks at hand. Then you need to hold them accountable.

I do recommend as you move forward to act with respect for each other within your community. Listen carefully to each other and attempt to reach strong support for the decisions you make.

Where you cannot agree, acknowledge it and let those whose positions didn't prevail know that they are still welcome in the community.

My thoughts about some specific steps you might take include the following:

**1. Assessment Workshop** -- Immediately distribute this report and the attached workshop survey to the entire congregation and schedule at least one public session to talk about it. A good way to build some interest around it is to have a few of you talk about it during the Sunday Service or write in the newsletter. The comments don't need to be long but should focus on what you learned during the workshop. You can also post some of the easel pad sheets that I worked from or created in response to your inputs during the workshop. Some of you can be there to explain their purpose.

## **2. 2005-6 Stewardship Efforts**

- It's good that John Huffman has agreed to conduct the campaign. I do encourage you, however, to immediately recruit a Co-Chair(s) for him who will agree to chair the 2006-7 campaign. I recommend that the recruiting of these two positions be a joint responsibility of the Minister and President. These positions are THAT important.
- I understand your decision to utilize small group social events as your means to obtain your pledges in this campaign. With this method, do give people a chance to ask questions and then think and/or talk for a reasonable period of time before they complete their pledge card. Your current mean pledge of \$1102 is offset by a median pledge (the pledge half way between the highest and the lowest) of only \$720. This occurs because 52% of your pledges are \$750 or less. Today we find that congregations who are working hard to grow, need stronger pledge levels than you have and, in fact, typically need **on average** 2.5-3.5% of people's income if they're going to accomplish all that they want to do. If you are to achieve such an average, many pledge units will need to contribute well in excess of the average. You need to start immediately to find ways to educate the congregation about the need for still more generous giving if the congregation of the future is to prosper.
- Assuming it is too late for this year, as you look ahead, consider a more personal pledging approach that concentrates on the current gift table and a suggested one for next year. Tied to them should be the Fair Share Suggested Giving Guide backed up by clearly defined funding priorities for the upcoming year. Said priorities need to show the benefits that will accrue to the congregation when you are able to fund them.

## **3. Strategic Plan**

- Your Site Acquisition Committee has done a great work. With the loss of your building, it sounds like plans are already underway to cover your immediate needs for a space or spaces to meet in the next few weeks. The building loss gives you the chance to more easily lease a somewhat larger space in line with the Committee's recommendations. Such a space will allow you to attract additional growth without being hamstrung by overcrowding that discourages many from coming (the 80% rule). I think that a two year

lease (perhaps even three) is the logical step to take given the other recommendations that I suggest below.

- With the successful acquiring of new leased space, I suggest that the Committee stay in business to continue its work at watching for potential land and especially existing church buildings or other buildings that may be restructured into a suitable church facility. You really have to stay on top of such things so that you don't lose a deal that you don't want to lose.
- Beyond all of the above, the key step is to develop at least a five-year strategic plan -- 2004-5 as a base and through 2009-10. Most banks and the UUA require a look at least five years into the future. I'd start with agreement on the number of members and pledging friends, pledge units, average pledge, Religious Education enrollment/attendance, Sunday Service attendance, and parking estimates. They help you to calculate everything else: staffing, programming, worship, etc. Initially these should be done without space limitations impacting them -- rather thinking about what your potential is. The process will then indicate what your space needs will be and when. Note that some space problems can often be solved programmatically -- e.g. two services. The "Piedmont" Long Range Plan that I left you should give you some ideas.
- With input from all aspects of the congregation the various goals and activities can then be established -- with \$\$, timing, and who is responsible. With all of the above, you can then prepare pro-forma financial statements for the five-year period. This is where "the rubber hits the road" and you will be able to see if your desires will fit within the income levels that you have projected. Often this is where adjustments need to be made before you have a viable plan.
- Once the plan is ready for final congregational action, ask for their approval of the direction that is included in it, including the assumptions/plans/costs for you to buy land and build or buy an existing structure. If they approve such a plan, then at the same meeting ask them to authorize a Financial Feasibility Study to confirm the readiness for what ever project you are recommending and to establish a reasonable dollar goal for a capital campaign. It is strongly recommended that you utilize an outsider to conduct the study.
- Upon receipt of the report from the study, the congregation will then determine if it wants to authorize a capital campaign and if so, to establish the dollar goal for the campaign.

#### **4. Using a UUA Fund Raising Consultant**

- As explained in the workshop, for purposes of the just completed Assessment Visit, the total charge will be \$900 (as a fair share congregation) and any future work will be at a rate of a \$1040 rate for 8 hours of time. Note that you pay one-way travel time, to a maximum of 6 hours but do NOT pay any transportation, hotel or meal costs.
- Additional consulting work might be desired with the process leading up to a Capital Campaign -- conducting a Financial Feasibility Study (interviewing 25-30 pledge units) and guiding you through the campaign itself. I estimate that each of these would entail

approximately 7- 8 days of time, or a cost range of \$7280 - \$8320. These decisions are typically made one at a time.

## 5. Potential Timetable

I think that the fastest you can accomplish all that you want will be on a schedule something like this:

- Annual Stewardship Drive -- Spring 2005
- New and somewhat larger meeting space – Spring 2005
- Strategic Plan – Spring 2005 – early Fall 2005
- Financial Feasibility Study – late Fall 2005
- Capital Campaign – Spring 2006-- in conjunction with Annual Stewardship Drive

*(The timing of the last two items will vary by when the item before it is complete. Don't rush the process at the expense of congregational support.)*

**6. Educating the Congregation** -- As you go through this process I suggest that you encourage members to learn more about growth and how to achieve "healthy" growth. Some good resources to review include:

- Salted With Fire - edited by Scott Alexander (UUA-Skinner)
- More Than Numbers, The Ways Churches Grow - Loren Mead (Alban)
- Raising The Roof, The Pastoral-to-Program Size Transition-Alice Mann (Alban)
- Congregational Handbook - edited by Larry Peers (UUA)
- Planning & Building Church Facilities - Gwenn McCormick (Convention Press)
- First Impressions - Robert A. Lee (Abingdon Press)
- Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations - Gil Rendle & Alice Mann (Alban)

You might even structure some Sunday services around subjects raised by them.

I hope that this gives you enough to work with. During this process if I can be of any assistance please call me at (706) 746-9981 or contact me via e-mail at [lwheeler@uua.org](mailto:lwheeler@uua.org). I would look forward to the opportunity to work with your congregation as you proceed. If, however, you would rather work with a different UUA Consultant please contact Wayne Clark, UUA Director of Congregational Fund Raising Services, at (207) 829-4550 or via e-mail at [wclark@uua.org](mailto:wclark@uua.org) and he will be happy to assign someone else to you. I wish you much success in your endeavors!

Sincerely,

Larry Wheeler

cc: Russell Elleven – Minister  
Bob Hill – Southwest District Executive  
Wayne Clark -- UUA Director of Congregational Fund Raising Services  
Amanda Schubert – UUA Congregational Fund Raising Services Program Admin.