



Next Steps Report for the Unitarian Universalist Congregation of Marin

I. Summary

The Unitarian Universalist Congregation of Marin (UUCM) has engaged Kay Crider, a Congregational Stewardship Consultant, to provide stewardship advice as UUCM explores renovation possibilities for its campus. The findings in this report are a more detailed version of the information provided during the Next Steps Summary presented to the congregation on September 25, 2022.

A. Compliments

- Very organized & with great skill sets!
- Excellent framing & messaging of project so far
- Enthusiastic developmental minister who is supportive & experienced with campaigns
- Robust annual giving and no debt
- Impactful Justice Work & Lifespan Spiritual Development
- Caring, welcoming and loving – you can feel it!

B. Observations

- Some scarcity mentality about a capital campaign = normal
- Beautiful location & building that needs renewal, but there's a lot to work with!
- Ministerial search process info. gathering also helps with capital project discernment
- Completing pledge phase in spring 2023 can help attract next minister

C. Recommendations

- Do some additional discernment on cost of your needs and wishes
 - prepare and recommend prioritized goals with cost estimates and gather feedback
- Be both practical *and* ambitious
- Focus on mission, the future of multi-platform church & building use possibilities

You have an excellent team in place to move forward, superb annual giving and no debt, and your congregation has healthy dynamics, all of which make you well-poised for success!

Next Steps Report for the Unitarian Universalist Congregation of Marin
October 2022

II. Basic Data on the Congregation

Name and Mailing Addresses of Congregation	Unitarian Universalist Congregation of Marin, 240 Channing Way, San Rafael, CA 94903
Website Address	https://uumarin.org
Minister	Rev. Marcus Liefert, Developmental Minister
Primary Points of Contact	Linda Haumann & Christopher Gilkerson, Capital Campaign Co-chairs
Number of Members	133 members certified to UUA in January 2022
Annual Financial Commitments 2022-23 (from July pledge records)	\$307,364 from 94 pledging households
Average Household Commitment	\$3,270
Median Household Commitment	\$2,000
Endowments (from 2022 Annual Report)	General: \$347,527; Wesley: \$131,636; Religious Education: \$120,302
2022-23 Operating Budget	\$523,100
Most Recent Capital Campaign	None

III. Brief Background

UUCM began in 1950 as the Marin Fellowship of Unitarians with 20 founding members. The first settled minister was called in 1954 with 90 members, a Religious Education Director was also hired, and the congregation grew to 350 members in six years. The congregation bought land and had architect Stephen Heller, in consultation with member architect Walt Van Gelder, design the current building that was completed and dedicated in 1965.

The building and its surrounding grounds are beautiful, but both need some restoration and upgrades. Some examples include smoothing out an uneven entry and patio, a reconfigured and wider main hallway for better accessibility, modernized and ADA-compliant restrooms, A/V upgrades, an elevator to access the lower level and more. An inviting shade trellis, a re-landscaped courtyard, new lighting, and an outdoor sound stage, are some of the other ways being planned to make the building and grounds more welcoming to the congregation as well attractive and useable for the wider community.

Cost estimates have been received on many of these items and the Building Team is working hard to gather realistic quotes for items on the wish list for the project. Some conversations with the congregation have been done and once the cost estimates are prepared, further engagement with the congregation is planned, with the nearest term meeting coming up on Sunday, October 9. A financial feasibility study, to determine a recommended campaign goal and gather other important information from participants, can be scheduled once the congregation has been engaged about the potential scope and cost of the project.

Next Steps Report for the Unitarian Universalist Congregation of Marin
October 2022

Currently Marin has a Developmental Minister in the fifth and last year of his developmental ministry. Rev. Marcus is enthusiastic about helping the congregation complete the active pledge phase of a capital campaign before a new minister is called. There are many items requiring repair and renovation, as well as accessibility needs that will help the church be more welcoming for current and future members.

IV. Scope of Work to Date

After preliminary conversations in December of 2021, and March, May and June of 2022, UUCM contracted with Kay in to conduct a Next Steps process in late September 2022, to receive advice on the process of moving forward with a capital project in light of the current status of the congregation, and to obtain a recommendation on best practices for a successful path forward.

Over the summer Kay received and reviewed substantial material, including information on finances, membership, programs, staffing, congregation history, bylaws, annual reports, newsletters, and some potential parameters for a building project. Kay also communicated with Linda Haumann, Christopher Gilkerson, Ted Gaebler, Susan Matthews and Rev. Marcus, in the lead-up to the on-site visit.

Kay conducted on-site meetings on September 23, 24 & 25 with Rev. Marcus, the Board, the Building Committee, the Capital Campaign Task Force, Stewardship, Finance, the Ministerial Search Committee, Worship Associates, Music, Social Justice, Family Ministries and Adult Spiritual Development, and several other members of the congregation, and had a tour of the building and grounds. A short electronic survey was not done since there are ongoing detailed surveys in connection with both the ministerial search and the capital campaign.

Following the Sunday service on September 25, Kay gave a detailed presentation to the congregation at 12:00PM, followed by a meeting with the Capital Campaign Task Force, Building Team, some members of the Board and Building Team and some other church leaders. A list of on-site meetings appears in Appendix A.

V. Commendations, Observations and Recommendations

A. Commendations

1) You are very organized and with great skill sets!

UUCM has a fabulous team working on each aspect important to a successful capital campaign. Highly capable people with great energy and follow through, and varied skill sets, as well as many engaged congregants who participated in the on-site meetings, puts you at the top of congregations with whom I have worked in recent years.

Next Steps Report for the Unitarian Universalist Congregation of Marin
October 2022

2) You have done excellent framing and messaging of your project!

A lot of excellent planning has been done to get the word out about your project, including a workshop for the congregation on August 28, some excellent drawings reflecting the possibilities for building renovation, a web page, newsletter articles about where you are in your process, and some superb framing of the components of your project wish list. Your preliminary visioning around the project with its four areas – Enter and Welcome; Rejoice and Move Freely; Engage in Community; and Learn, Play and Reflect – is outstanding!

3) You have an enthusiastic developmental minister who is supportive and experienced with campaigns.

UUCM is nearing a transition point with Rev. Marcus beginning his fifth and last year of his developmental ministry. As you embark on a search for a settled minister, Rev. Marcus has indicated he is very supportive of helping the congregation complete the active pledging phase of a capital campaign prior to his departure, which will free up a new settled minister to focus on other aspects of serving the congregation in their first years of ministry. The building needs several important updates that will be attractive to an incoming minister and give them relief that capital campaign pledges will have been made before they arrive.

4) UUCM has robust annual funding and no debt.

Your annual financial commitments from your members evidence a deep commitment to UUCM. Your average pledge of \$3,270 is superb, as is your median pledge of \$2,000! Some congregations need to do a capital project when they have existing debt and average annual funding; UUCM is in a better position to move forward in its current financial position.

5) You have impactful justice work and lifespan spiritual development.

Members of UUCM do individual as well as coordinated justice work in a variety of areas. In addition, your collaborative work with the Marin Organizing Committee is one of the ways you show your commitment to justice in the wider community. UUCM's family ministries and adult spiritual development were also lifted up during my meetings with congregants, and there were several children in attendance at the beginning of the Sunday service, a good sign as you move out of the pandemic and into the church year.

6) You are caring, welcoming and loving – you can feel it!

In all my meetings on site, your interactions and sharing of meaningful experiences projected your healthy dynamics as a congregation. That atmosphere is important as you discern the scope of your building project and work on all other aspect of church life.

B. Observations

1) There is some scarcity about a capital campaign, which is normal.

Your congregation has a healthy giving profile for its program funding and operations. Capital projects are, by their very nature, larger in financial scope and can seem daunting. It is natural for some members to worry about the cost and/or assume that there are not congregants who can give the larger gifts necessary to reach a campaign goal.

UUCM is doing a great job so far with its August workshop, survey, web page and newsletter articles to engage the congregation about the scope and benefits of various repairs, renovations, and upgrades. This engagement is essential as you move forward and as congregants become more familiar with the process and what other UU churches have accomplished, some of the scarcity mentality will diminish.

a. Typical and ambitious ranges for capital campaigns

In general, we see the typical range for a successful capital campaign as 3- to 5-times your annual giving. UUCM pledges for the current 2022-23 church year are at approximately ~\$310,000. This level of pledging gives UUCM a typical range of \$930,000 to \$1.5 million for a capital campaign. In the last five years we have seen some outlier results for our congregations of 6.5, 8 and 9.75 times annual giving for a capital project. If UUCM can obtain that very high level of support for your project, that could mean as much as \$3 million.

b. Anchor gifts and angel gifts

A key factor to reach your goal for a large capital project is to have an anchor gift of 15-to-20% of your total. For example, a gift of \$300,000 would be the 15% anchor gift for a \$2 million project, and a gift of \$450,000 would be 15% of a \$3 million project. Those anchor gifts still need to be accompanied by other large gifts, to meet your goal.

An “angel donor” is a term sometimes used in our campaigns to refer to a household that gives more than 20% of a campaign total. Those types of gifts are unusual but do occur in our UU congregations. For example, if a household gave \$1 million in support of a \$3 million campaign goal, that could inspire many households in the congregation to stretch give to reach an ambitious goal.

Once a project cost estimate is ready to be revealed to the congregation, I can build you a gift chart, to show the gift amounts and gift distribution that would likely be needed to achieve that total, considering UUCM’s number of pledging households.

Next Steps Report for the Unitarian Universalist Congregation of Marin
October 2022

c. Pledges can be spread over 3 years, to help congregants stretch give

A typical pledge payment period for this size campaign for your size congregation would be 3 years, with some households able to give their entire gift up front and many others spreading their gift over the three years. Often $\geq 50\%$ of the total funds pledged in a campaign are paid in the first year of the three years.

d. Readiness indicators for a capital campaign

In general, readiness indicators for a capital campaign are:

- a compelling vision and plan for your programs & building
- awareness of need(s) by congregants; a sense of urgency
- consensus on your path forward
- engaged congregation with low conflict
- healthy annual stewardship
- people willing to make it happen

Looking at these indicators, you have some education and consensus building about the scope and cost of your project, however, if done well, you will be poised to move forward with a feasibility study and subsequent capital campaign. Many, if not most, congregants at UUCM are already aware of the need for repair and renovation, and you have an engaged, healthy congregation with robust annual stewardship and people willing to plan and manage the process.

When planning for a major capital project, obtaining a supermajority consensus from the congregation is important. That means 85-90% or more of congregants in favor of the project. To be clear, that does not mean 85-90% of the congregation is excited about *every* component of the project or 85-90% of the congregation is getting exactly what they want in a building project. It means that there has been due diligence and discernment by your building team about what is possible to do for UUCM's campus, the congregation has had opportunities to engage in dialogue about it, there is trust in the process and the people who are working hard on the details of the effort, such that 85-90% of the congregation is in favor of the general scope of the project.

2) UUCM has a beautiful location and building that needs renewal, but there's a lot to work with!

There has been some updating of your inner and outer spaces since the building was dedicated in 1965, however, there are many areas in need of renewal and renovation, especially as they relate to accessibility.

One of the positive aspects of the project is that you have an amazing campus and building footprint to build upon (pun intended). The architects who originally designed your building had an amazing vision that is not replicated in many of our western U.S.

Next Steps Report for the Unitarian Universalist Congregation of Marin
October 2022

UU buildings constructed around this same time. The potential renovations are laid out in the Schematic Design that shows how your vision would be manifested.

3) Your information gathering for your ministerial search process also helps with capital project discernment.

A detailed survey went out to the congregation as part of your ministerial search process, and the capital campaign task force also held a workshop focused on some questions specific to a capital project. Members who have not had a chance to give their input on the capital project can do so at: <https://uumarin.org/congregation-news/capital-campaign-questionnaire/> or email them to Linda Haumann at lhaumann@comcast.net

4) Completing your pledge phase in Spring 2023 can help attract your next minister.

As Rev. Marcus wraps up his fifth and last year of developmental ministry for UUCM, he is willing and enthusiastic about providing ministerial support for a capital campaign. If your pledges are in hand by June 2023, the end of the congregation's year, even if the payments are spread over three years, that significant undertaking will be done before your new minister arrives.

C. Recommendations

1) Do some additional discernment on the cost of your needs and wishes.

Some essential components of the process leading up to a capital campaign are:

- investigation of options associated with your building needs
- gathering input from the congregation about their realistic hopes and dreams for your building
- giving feedback after determining the financial feasibility of those potential project components, and
- providing a recommendation for the path that will best serve UUCM.

You have experienced people working on the potential scope and cost estimates for the project, and they will engage the congregation about that information, and make an informed recommendation. A congregation funds a project with their stretch giving when they trust the process and have been given the opportunity to ask questions and give input.

Keep in mind that change, especially if it involves large amounts of money, is embraced at varying speeds by congregants and can make some people anxious. Your members and friends need time to understand the various options considered and have the opportunities to ask questions and/or make suggestions. In order to maximize giving, a financial feasibility study is best done when a super-majority of your members and friends are

Next Steps Report for the Unitarian Universalist Congregation of Marin
October 2022

excited about the project, are clear on its scope, and trust that it is the best option for the congregation.

If after discernment and cost estimates for your project, you feel that UUCM can take on some debt, there are some important considerations:

- Debt should be considered *after* you have raised as much capital as possible in a successful capital campaign. You can investigate the short and long-term costs of a loan as part of your due diligence leading up to a campaign, however, outright gifts should be solicited first.
- The *maximum* debt service ceiling recommended by the UUA is $\leq 25\%$ of your annual budget. Realistically, a 25% increase in your budget is very hard to absorb. Debt service that is $\leq 15\%$ of annual budget debt service is ambitious, but we see congregations able to manage this level of debt and still fully fund their programs. For UUCM, that would be approximately \$75,000/year in debt service given your FY22-23 budget of \$523,000.

UUCM *might* be able to obtain some grant or corporate funding if you renovate the downstairs space for a day care that also aligns with your mission. Several congregants noted that day care is a scarce commodity in your area. Be sure to investigate what is allowed by current zoning and non-profit tax laws if you decide to rent the lower space for a day care or school. In addition, some community foundations are broadening their funding to include churches, especially if your project is helping fill a community need. More than one congregant mentioned that it's possible a nearby corporation may agree to fund a portion of renovations if the day care is dedicated for their use. Keep in mind that you may want to have a tenant/renter that will not require you to remove any UU-related materials that you wish to have on the walls, which can sometimes make a congregation feel like they are in a rental space on Sundays or other days, even in a building that they own.

2) Be both practical *and* ambitious.

You are a savvy and intelligent group, so I know you can be practical *and* ambitious. You have the guidelines above about what is typical and what has been possible for some congregations; keep those in mind as you move ahead. You have a lot of positive indicators with people, place and funding possibilities!

3) Focus on mission, the future of multi-platform church & building use possibilities.

I heard many exciting ideas for the use of your building that could make it more welcoming for people within your congregation and to those in the wider community. In this new era of church in an endemic world, your preliminary vision for UUCM's campus is bold and can provide opportunities for you to live out your mission in both current and new ways and be a beacon for many beyond your walls.

Next Steps Report for the Unitarian Universalist Congregation of Marin
October 2022

As you move forward with further discernment and engagement on this project, remember to fully support your programs since they are the core of your mission. Annual pledges should not be reduced to fund a capital project.

VI. Big Picture Timeline

Fall 2022: Additional discernment around project scope and cost estimates, prioritization of items, and gathering feedback from congregation

Late Fall/Early Winter 2022: Financial Feasibility Study

Late Winter 2023: Wrap project around FFS Results; Congregation votes whether to proceed on Combined Campaign*

Spring 2023: Conduct Combined Campaign

*A Combined Campaign involves obtaining annual and capital pledges at the same time. These types of campaigns are increasingly carried out by congregations and can be done well and without reduction of annual program funding.

VII. Closing

Please let me know if you have any questions or discussion points about items in this report. You are an inspiring, highly capable and team-oriented congregation – I look forward to our continued work together!

In spirit,



Kay Crider

KCU Consulting LLC, part of the Stewardship for Us alliance
UUA Endorsed Provider

c: Rev. Marcus, Developmental Minister
Linda Haumann, Capital Campaign Co-Chair
Christopher Gilkerson, Capital Campaign Co-Chair

Next Steps Report for the Unitarian Universalist Congregation of Marin
October 2022

APPENDIX A

**Next Steps Agenda
for the Unitarian Universalist Congregation of Marin**

Friday, September 23, 2022	
5:00 PM	Meeting with Rev. Marcus, Minister
6:00–8:00PM	Meeting with Board of Trustees, Minister & Capital Campaign Co-Chair
Saturday, September 24, 2022	
9:00–10:00AM	Tour of building & grounds
10:00–12:00AM	Meeting with Capital Campaign Task Force, Stewardship & Finance
12:00 PM	Lunch with church members
1:00 PM	Meeting with Ministerial Search Committee
2:00 PM	Meeting with Music & Worship
3:00 PM	Meeting with Social Justice
4:00 PM	Meeting with Family Ministries and Adult Spiritual Development
Sunday, September 25, 2022	
10:30 AM	Sunday Service (Kay gives 2-minute invitation to presentation after service)
12:00 PM	Presentation of info. & recommendations to congregation with Q&A
1:00 PM	Debrief with capital campaign team, board, minister, building team and other leaders

PLANNING FOR THE WEEKEND:

- Please arrange for childcare as needed.
- For Sunday’s presentation, please provide a projector and screen or blank wall for the presentation.
- Consider providing a snack for the Sunday meeting with the congregation if your endemic-world protocols allow it; sometimes there is better attendance for the presentation if some food is available, especially if it follows a service and is around mealtime. The more attendees, the better the understanding of recommended processes.