



**Unitarian Universalist Church of Evansville, Indiana**  
**Assessment Visit Report**  
**Summary of Report by Barry Finkelstein, Congregational Stewardship Consultant**

***Purpose***

The purpose of the Assessment was to explore the strengths and assets of the Unitarian Universalist Church of Evansville (UUCE) as a step toward a unifying vision, strategic plan, and strengthened stewardship. The Assessment is part of a broader initiative to explore all of UUCE's assets including its facilities, and its professional and lay leadership.

***Presenting Issues and Challenges***

Little growth in congregation; overspending budget and using approximately \$16 – 20,000 of endowment each year to balance budget; desire to increase involvement of members.

**FINDINGS AND RECOMMENDATIONS**

***Commendations***

UUCE has much to be proud of and to build on. You have faced challenges, successfully navigated a ministerial transition, and are poised for a dynamic new phase in your congregational life. I urge you to focus on the following strengths in your journey:

- Commitment to professional spiritual leadership – you recognize the value of full-time professional ministry and are willing to make the necessary commitment of financial and leadership support to sustain it.
- Heading in the right direction on many fronts – an effective membership program, worked to grow your children's and adult RE program, begun a strategic planning process and successfully obtained grant funds to help support this work.



- Much going on – a variety of church programs you have underway and the level and energy of participation. You are doing much work for social justice. Your newsletters are filled with opportunities and your classrooms are filled with children!
- Solid core of lay leaders, would like to expand that core. You are open to new ideas and new leaders. Several of the leaders I met had joined UUCE in the last 2-5 years.
- Stewardship – you have taken great strides in organizing an effective stewardship program, building a foundation that will serve you well. You have embraced the ideas in Beyond Fundraising, and should be proud of the success of your campaign last year – especially in the context of the weak economy and a transition year.
- Generosity despite challenges – despite financial challenges, you continue to commit your fair share contributions to the UUA and the Heartland District, and continue to share the collection plate once a month.

Keep these strengths clearly in your sights and consciousness, as they form a solid foundation for renewing your vision and mission, strengthening your stewardship, and growing and deepening as a community.

### ***Observations***

Twenty people completed a brief survey form and all respondents indicated a preference for growth. The most frequently cited challenges facing the congregation are achieving financial stability, growing and managing for growth, and strengthening membership and leadership development.

During the Assessment visit, we had much discussion about growth and how to achieve it. UUCE is not growing as the number of new members has not been sufficient to offset those leaving. Some of this is due to transition, and some to a lack of a clear vision and strategic plan. Explore your reasons for wanting to grow, and focus on growth as a way to enrich the community, to bring about personal and community transformation, and to increase the ability of the congregation to pursue its mission in the world.

### ***Recommendations***

I offer the following recommendations:



- ***Continue the conversation*** begun this weekend. People relished the opportunity to engage in deep sharing of personal stories and to explore new ideas about congregational life. Keep this going by (1) making this report widely available to stimulate ongoing interest and discussion; and (2) to providing an ongoing series of formal and informal mechanisms to continue to talk, share, and listen. Use electronic communication mechanisms as well as small and large group gatherings and classes for this ongoing conversation.
- ***Move rapidly to create a full strategic plan*** – Begin with a Searching for the Future (SFTF) weekend to complete the World Café process. SFTF engages large numbers of congregants in an intensive, facilitated weekend to craft a unifying vision and a start at concrete strategic goals and action items. Following the weekend, appoint a task force to develop a comprehensive strategic plan that would address long-term issues of ministry, programming, staffing, facilities, and resources. The strategic plan will help focus your programs and resources, and provide a filter for determining what you will do, what you will not do, and how to allocate resources. Complete the strategic plan during this church year, with adoption by the Congregation at the 2010 annual meeting.
- ***Strengthen stewardship process and generosity*** – Strengthen next year's annual budget drive by basing the campaign on one-on-one stewardship conversations with all members and friends. Establish a goal of funding at least 80% of your operating budget from member contributions raised by the annual budget drive, reducing dependence on the endowment and other sources.
- ***Leadership Development*** – continue your focus on leadership development and training, and take advantage of the available grant funds for this purpose. Consider the following to reduce leadership burnout and make it easier to recruit new leaders:
  - Use well-defined, time-limited task forces instead of long-term committees where possible
  - Recruit people using a direct, personal approach that recognizes their individual talents and interests
  - Make space for new leaders, allowing current leaders to step aside for a while, even if some work does not get done for a time. Leaving space gives new people a chance to step in.
  - Redefine jobs that are hard to fill
- ***Membership Development Program*** – continue to build on the work of your membership committee, which has correctly focused initially on the greeter and visitor follow-up functions. Document a comprehensive membership development plan that focuses on not just new people but long-time members too. Clarify the process for becoming a member and the



responsibilities and benefits of membership. Coordinate all membership programs with UUCE’s vision, strategic plan, and communication programs, and reflect the target demographic you are pursuing, for example, young families.

**PROPOSED NEXT STEPS AND CONSULTING SUPPORT**

The following is a recommended set of next steps for UUCE along with specific opportunities for and costs of continued UUA congregational stewardship consulting support.

Task	Schedule	Consulting Time and Cost
Searching for the Future (SFTF) – flesh out vision and initial goals and tasks (see Appendix E)	January 2010	2.5 Days = \$1,900
Stewardship/Annual Budget Drive – planning support for the Committee, conduct orientation sessions for visiting stewards	January 2010 (combined visit with SFTF)	1 Day = \$760
Follow-on support by telephone and email for developing the strategic plan and supporting plans (e.g., membership development and leadership development)	January – May 2010	1 Day = \$760

UUA consulting fees are \$760 per day which is all-inclusive of labor and expenses. We charge only for time worked and for time spent one-way in transit, which also covers prep time and review of materials. I would work with you along the way to manage your costs so you get the greatest value – and would give you options along the way.

**CLOSING**

UUCE is a special congregation poised doing wonderful things as Unitarian Universalists in Evansville and in the world – and . You can achieve your dreams for the future by coming together as a community to create a clear and compelling vision that focuses on UUCE’s unique role in the world.