



**First Unitarian Church of Toledo, OH  
Assessment Visit Report  
June 13-15, 2008**

**I. SUMMARY**

The First Unitarian Church of Toledo engaged the UUA for an Assessment Visit, which was conducted by Barry Finkelstein, an independent stewardship consultant. The objective of the Visit was to determine the congregation's readiness for a capital campaign to raise funds for the purchase of a new building. The Visit was conducted from June 13-15, 2008, with Barry presenting an oral report to the congregation following worship services on Sunday, June 15. This report presents Barry's findings and recommendations.

The Congregation is embarking on two major transitions this summer and fall. First, they will move to a new church home in a different Toledo neighborhood. And second, they will welcome a new settled minister, Rev. Beth Marshall. These two major transitions come with stress and upheaval, but also great opportunity and excitement.

The Assessment Visit produced two key findings. First, it seems clear that the congregation is ready to conduct a capital campaign. The Relocation Committee and Board have led the congregation through an effective process of engagement and decision-making that resulted in the purchase of a new building and the sale of its existing facilities. With approximately 90% support for the move, the congregation should be well-prepared to raise the funds necessary to finance the purchase.

Second, the move to a new facility and new neighborhood, and the beginning of a new settled ministry, offer the congregation a once-in-a-generation opportunity to re-think its vision and mission in the larger community. The idea is to consider the congregation's unique strengths and proud traditions, such as Sophie's Hygiene Pantry, the lunches served lovingly by the Kitchen Committee, and the RE program, and determine how to reinvent or replace them in your new environment and with your new minister.

In view of these two findings, I recommend that you engage in a rapid process to renew your vision and mission, and identify high priority actions to be taken to further your mission in the new neighborhood with your new minister. This process will help energize the congregation, create a positive context for the transition, and identify needed resources. This should be accomplished in the early Fall of 2008, thus laying the groundwork for a high-energy capital campaign to begin late in 2008 and continue through the Spring of 2009.



## II. INTRODUCTION

### *Background Data*

Name and Mailing Address of Congregation	First Unitarian Church of Toledo 2210 Collingwood Blvd Toledo, OH 43620
Website Address	www.uutoledo.org
Dates of Visit	June 13-15, 2008
Minister(s)	Rev. Rod Thompson, Interim Rev. Lynn Kerr, MRE Rev Beth Marshall, Settled Minister (August 1, 2008)
President	John Eichbauer
Number of Members	306
Annual Financial Commitments	\$242,000 (2007)
Average Financial Commitment	\$1,300
Endowment (Permanent Funds)	\$450,000
Approach to Annual Budget Drive	Abundance Sunday (Commitment Sunday)
Date and Summary of Last Capital Campaign	1995-1998 Building Renovations; Goal \$130,000, Raised \$136,000

### *Presenting Issues and Challenges:*

The focus of the Assessment Visit was to determine readiness for a capital campaign to finance the purchase of a new building.

### *Steps Already Taken:*

The Congregation has reached agreements to purchase a new building and sell its existing facility. These transactions are the culmination of a several-year process of discernment and exploration of options. To carry out this process, the congregation appointed a Relocation Committee with diverse skills and representing diverse groups within the congregation. The Committee explored options and then moved aggressively to pursue an opportunity that arose to purchase an existing church facility on Glendale Avenue in Toledo. The Committee facilitated numerous opportunities for congregational involvement in the decision-making process, resulting in overwhelming approval (87%).



The Committee lined up bridge financing in the form of a loan from a local bank to cover the cost of the new building (less money received as proceeds from the sale of the current facility) pending completion of a capital campaign. The bridge loan has a maximum term of three years.

**Contact with District Executive:** Barry had a phone conversation with Joan VanBecelaere in advance of the visit.

**Contact with Ministers:** Barry had phone conversations with Rev. Thompson, Interim Minister, and Rev. Marshall, new Settled Minister, in advance of the visit. He also spoke with Rev. Lynn Kerr by telephone afterwards.

### **Historical Perspective.**

The congregation dates its history to the mid-1800s, when Unitarian and Universalist preachers made their way to Toledo. In 1860, the Liberal Society purchased a building of its own and changed its name to the Unitarian Society. The building on Collingwood Boulevard was built in 1922. Milestones cited by congregants during the Assessment Visit included a history of strong ministry, engagement in social action projects in the community, and the current transition to welcome a new settled minister and move to a new facility.

### **Visit Objective and Schedule**

The objective of the Assessment Visit was to provide an independent perspective on whether the congregation is ready to initiate a successful capital campaign.

The visit was conducted from Friday evening, June 13, 2008 through Sunday afternoon, June 15, 2008. The schedule is presented as Appendix A. Barry received and reviewed substantial material in advance of the visit. Twenty congregants attended the Friday and Saturday meetings and approximately 40 people attended the Sunday afternoon forum. Forty-two people completed survey a brief survey; the form and results are provided in Appendices B and C.

## **III. FINDINGS AND RECOMMENDATIONS**

During the weekend visit, participants noted many strengths of the congregation, both in the survey responses and during meetings. Among the strengths most often mentioned were the dedication, commitment, and talents of church members; the depth of caring in the church community; strong programs in RE, music, and social justice; and trust in leadership. Two of the most often mentioned challenges were related to the transitions underway – the move to a new facility and the welcoming of your new minister. The third major challenge is the need to ensure long-term financial stability, focusing on balanced operating budgets, a successful capital campaign to fund the purchase of the new facility while preserving the endowment, and strengthened stewardship as a long-term value.



The survey responses indicate strong support for growth in membership. Of 42 responses, only one person indicated a preference for no growth. A large majority prefers growth between 5 and 10 percent per year.

## **Commendations**

At the Sunday afternoon forum, I offered the following commendations:

- Relocation process – The Relocation Committee and Board led the congregation in an effective process for considering alternatives and making a decision that an overwhelming majority supports. The process entailed effective communication through excellent materials and numerous meetings. Large numbers of congregants participated, including visiting the new facility.
- Ability to seize the moment – The congregation mobilized effectively to make rapid decisions and carry out the tasks necessary to carry out the sale of its current facility, purchase of the new facility, and arrange all the details of bridge financing and the move. All this was done with full participation of the congregation and during a time of many transitions.
- Move toward financial responsibility – Steps are being taken to put the congregation's fiscal house in order. Weaning yourselves from the endowment for the operating budget and creating a balanced budget are essential and to be commended.
- Endowment – Preserving the endowment has been a priority. We recommend that congregations build up their endowments to at least 2 to 3 times their annual operating budget. You are well on the way with unrestricted funds of \$450K.
- Plans for memorial service for the building – Your plans for commemorating the end of your time in the current facility and allowing people to grieve are laudable. Recognizing the spiritual connections members have to the facility will help with the transition and healing.
- Active Membership Committee – You have an active committee that is doing many things right – greeters, visitor follow-up, Pilgrims to Poets classes, social clubs and events, starting a mentor program, working on a database, directory, and software. The effectiveness of all this is indicated by the 18 visitors who became new members in the past year – a great result in a time of transition.
- Programming – People spoke proudly of the many programs offered by First Unitarian, notably RE, music, small group ministry, OWL, youth group trip to New Orleans. You have a very active adult RE program with much participation.



- Long-standing commitment to social justice – Your passion and commitment to living your faith in the community is clearly an essential part of your mission. I heard much about such initiatives as Shirley’s Soaps ‘n’ Such Hygiene Pantry, Planned Parenthood, FOCUS, IHN, Habitat for Humanity, UUSC programs, etc.
- Welcoming congregation – You have successfully completed the process to become a Welcoming Congregation, an important achievement in living our UU faith.

## Recommendations

I offer the following recommendations:

### 1. Engage the Congregation in Visioning through Searching for the Future

The transitions currently underway present great opportunities for the congregation to come together and reflect on its ministry and mission in its new community and with its new settled minister. I recommend that you take advantage of this opportunity and engage in a structured conversation among yourselves to refresh and renew your mission, vision, and strategic priorities, especially as they might be supported by a Capital Campaign.

Searching for the Future (SFTF) is a weekend program of small group workshops that can be tailored to the specific needs of a congregation. SFTF helps a congregation clarify its vision, create a mission statement, and develop a starter list of goals that can later be incorporated into a strategic plan. For your case, we would focus the goals largely on those items that can be folded into a capital campaign, for example, building improvements and seed money for staffing and programs. An overview of the process and helpful information for preparing for the workshop is included as Appendix D. For the process to be successful, it will be important to engage at least 60-80 members in the process – more if possible. If fewer than 50 indicate availability, it would be better to delay or reconsider.

### 2. Financial Feasibility Study for a Capital Campaign

The first step in a successful capital campaign is a Financial Feasibility Study (FFS). The FFS entails an objective analysis to project the range of funds the First Unitarian Church of Toledo should be able to raise to support the move to the new building and other goals identified. The work to conduct the FFS includes confidential personal interviews with between 15 and 20% of donor households (between 30 and 40 for Toledo) to determine their level of support for the proposed project. It also includes analysis of current annual giving and extrapolation from annual financial commitments, along with interview results, to project the likely level of giving for the capital campaign. Using an outside consultant for the FFS is highly recommended.



### **3. Capital Campaign/Combined Campaign**

Assuming the FFS is successful, I recommend that you mobilize to conduct a capital campaign to raise the funds for the move and other program needs identified. Given the congregation's desire to proceed as quickly as possible, it may be practical to conduct the silent leadership portion of the campaign in the late Fall of 2008, with the general gifts portion combined with the Annual Budget Drive in the Spring of 2009.

A successful campaign will require substantial organization and planning. I urge you to consult Beyond Fundraising, by Wayne Clark, for information on how to organize yourselves for the campaign. As noted below, consulting support can be useful.

### **4. Other Steps to Strengthen Stewardship and Support Growth**

This is a good time to take additional steps to firm up the congregation's financial footing. Specific areas to focus on include:

- Annual Budget Drive – build on the successes of the past three campaigns, adopting as a primary approach one-on-one stewardship conversations. A combined annual/capital campaign will help with this shift.
- Endowment – formalize the endowment by creating appropriate governance structures and adopting formal written policies and procedures for controlling the funds and making decisions about their use. Incorporate an active planned giving program. Continue weaning yourselves away from using the endowment to balance the operating budget. Refer to the section in Beyond Fundraising for information about endowments and planned giving.
- Fair Share – responsible church stewardship includes raising sufficient annual operating funds to enable full fair share contributions to the UUA and District. These contributions cover important congregational services such as ministerial settlement and growth consulting, and also increase the reach and effectiveness of our Unitarian Universalist movement. Consider a three-year plan for phasing in increased contributions until fair share is attained.
- Membership Coordination and Leadership Development – build on the work of the Membership Committee to promote member engagement and cultivation of new leaders. Consider a dedicated staff position as membership coordinator, perhaps beginning with a volunteer or using seed money from the capital campaign, and move gradually toward a paid position.



#### IV. RECOMMENDED CONSULTING SUPPORT

As discussed during the Visit, you can partner with the UUA for additional consulting services to help you implement the above recommendations. I recommend that you consider contracting for the following services:

Activity	Schedule	Consulting Days	Consulting Fees @ \$1,300/Day*
Searching for the Future: Preparation and conduct of weekend visioning process, and follow-up to help with further planning and case statement development. One visit.	September 19-20 or October 3-5, 2008	3-4	\$3,900 - \$5,200
Financial Feasibility Study: Conduct of confidential interviews, analysis of financial data, and presentation of results. Two visits.	October 2008	8-10	\$10,400 - \$13,000
Initial Support for Capital Campaign – planning for the leadership gifts portion of the campaign and orientation (training) for visiting stewards. One visit.	Fall 2008	2-3	\$2,600 - \$3,900
Support for Combined Capital Campaign and Annual Budget Drive	Spring 2009	TBD	TBD

*\*Note – Per Diem Cost of \$1,300 is all inclusive and covers time and expenses. Congregation will be charged only for actual time spent up to not-to-exceed amounts.*

#### Next Steps

Key next steps to proceed with the recommendations are:

- Firm up the date and execute the contract for the SFTF weekend
- Begin the process of organizing for the SFTF weekend, including logistics, recruiting facilitators, publicizing the sessions, and registering participants.

It has been a pleasure and an honor to work among you for the Assessment Visit, and I hope that I can help further as you continue to live your grandest dreams. If you have any questions, please call or email me.

Faithfully submitted,

Barry P Finkelstein  
 UUA Congregational Stewardship Consultant  
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**Appendix A**  
**Schedule for the Assessment Visit**

**Unitarian Universalist Association**  
**Congregational Stewardship Services**

**Consultant: Barry Finkelstein**  
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**603-319-4911**

**Assessment Visit Schedule for**  
**First Unitarian Church of Toledo, OH**  
**June 13-15, 2008**

**Friday June 13, 2008**

- 5:30 pm Dinner with Nick Conrad  
7:00 pm Informal reception at the home of Nick and Gail Conrad. Attending will be members of the Relocation Committee and Board

**Saturday June 14, 2008**

- 9 am Relocation Committee  
10 am Finance Committees (Stewardship, Endowment, Finance)  
11 am Program Committees (RE, Membership, Kitchen, etc.)  
12 noon Lunch with Board and Relocation Committee  
1:30 pm Open Meeting

**Sunday June 15, 2008**

- 11:00 am Attend the morning worship service.  
12:00 pm Open forum for all interested congregants. Barry will offer his observations and recommendations.  
1:30 pm Meeting with Board and Relocation Planning Committee to answer any remaining questions and to provide more specific, next-step recommendations.  
3:00 pm End of the Assessment Visit.
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## Appendix B

### Assessment Visit Survey for First Unitarian Church of Toledo June 13-15, 2008

1. What are the three most significant milestones or events in this congregation's history?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

2. Please complete the following sentence by circling one option below: Over the next five years, I would like to see our membership experience the following annual growth rate:

1. no numerical growth.
2. 5 percent annual increase in membership.
3. 10 percent annual increase in membership.
4. 15 percent annual increase in membership.
5. greater than 15% annual increase in membership.

3. What are the three greatest strengths of this congregation?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

4. What are the three most important challenges this congregation needs to address in the next five years?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



## Appendix C Survey Results – 42 Participants

### 1. Milestones

Response	Number
Upcoming move to new church – Getting together to vote and decide to move from Collingwood Blvd, diligence and speed of transition prep, promoting acceptance by congregation	26
Ministers -- Gary Blaine's first sermon, Wally Argow's ministry 1950-60 – history of great ministers, Rod Thompson's interim ministry, calling Rev Beth Marshall	22
Reaching a balanced budget	7
Building church at Bancroft and Collingwood	6
Mid-80s schism over location, Maumee Valley	5
Establishment of liberal faith community in NW OH (Founding)	5
Continued growth and sustainment over a long period, long tradition	3
Radio ministries	3
Bishop Spong's visit	3
Establishment of Shirley's Soaps 'n' Such Hygiene Pantry (and earlier FOCUS)	3
Board focused and communicative, current leadership	2
Enhanced social hour after church – community building	2
The Gathering (alternative music)	
9/11 service	
Pastor Jennings in 19 <sup>th</sup> century brings the congregation back to life	
Recent kitchen renovation (2000)	
Getting the clock fixed	
Beginning of chalice circles	
Fighting the fascist priest in the 1930s	
Service on legalizing marijuana – not afraid to confront controversial issues	

### 2. Growth Preference (Annual)

Of the 42 responses, only 1 said no growth, overwhelming majority 5 or 10%.

Response	Number
No numerical growth	1
5% annual increase	16
10% annual increase	12
15% annual increase	3
Greater than 15% increase	6
Other	2
No Answer	2



### 3. Strengths

Response	Number
Committed members, willingness to fulfill commitments, devoted volunteers, people believe the covenant, loyalty, willing to support with \$\$	18
People, warm supportive, genuine respect and liking of one another, joyful interaction, friendliness, my friends, wealth of talent, treasure, and experience, fellowship	16
Vibrant faith community, caring community, lots of good energy, friendly loving community, breaking bread together	16
Education, intellectual curiosity, intelligence of members, interesting, continual learning process, open to new ideas, non-judgmental	14
Social justice/outreach/generosity – interfaith, IHN	9
Adult and children’s Programs, Children’s RE, Adult RE, small group programs	9
Music program, music experience, The Gathering	6
Strong president, Growing trust in church leadership, good people for leadership	5
Respectful consideration of all members input, Openness, open-mindedness, tolerance	5
Liberal religiously, theologically, politically	3
Professional staff, ministers (lay, professional, interim), history of excellent preaching	3
Some degree of diversity	2
Living our faith	
UU Principles and Purposes	
Membership/welcoming process	
Long tradition in community	
Excellent resources from UUA and the district (OMD)	
Mission	



#### 4. Challenges

Response	Number
Moving to new location, adapting to new building, tighter quarters, getting comfortable in new home, being a community in the new community, making the new church beautiful and welcoming and supportive of congregational life, finding new identity	24
Finances -- Increasing pledge per member, maintaining financial stability, balanced budget, more money, survive financially	20
Retaining new members, growing membership, attract and encourage new members, more committed members, attract young families, increasing stewardship in time and \$, keep membership growing and involved, accept new members, reach out and heal wounds from the transition process, attracting people	18
Adjusting to new minister, getting to know and embrace her, creating new energy with Rev. Beth	9
Completing successful capital campaign, paying new mortgage, getting people on board for a successful capital campaign, raise \$\$ for buying and improving our new church -- kitchen	7
Maintaining current momentum, continuing enthusiasm to embrace the transitions, avoid complacency, continuing fellowship opportunities, continue good process	4
Increasing (continuing) involvement in social justice, re-think and reaffirm	4
Children's RE program must be strengthened, getting back to FT RE director	3
Positive impact on Toledo community, esp underserved populations, greater presence, continue local ministries	3
Public information (outreach), PR	3
Increasing volunteers, making volunteer jobs more manageable	3
Developing 5-10-25 year strategic plan, think about legacy	2
Redefining mission to fit new location and minister, updating vision and mission	2
Becoming comfortable with new staff structure, retaining ministerial staff	2
Managing strong and different opinions about running the church	
Develop "can do" attitude to promote UU values	
Engage entire congregation in moving forward	
Transition to new software systems	
Negative attitudes of those wanting to stay at Collingwood	
Stay focused and not get sidetracked	



## Appendix D SEARCHING FOR THE FUTURE

*Searching for the Future* is a weekend program of small group workshops designed to help a congregation clarify its vision, create a mission statement, and develop a starter list of goals that can later be incorporated into a strategic plan. It is highly participative, and should include as many members of the congregation as possible. The workshops are lively, making the process of clarifying vision and mission not only painless, but actually fun. The process can be tailored to the specific needs of each congregation.

Lay leaders willing to help facilitate a workshop meet on Friday evening with the consultant to go through the process of articulating a vision, creating a draft mission statement and brainstorming goals in support of the mission. On Saturday, these leaders and the consultant facilitate several small groups of church members to go through the same process. Late Saturday or Sunday, the facilitators meet again with the consultant for a wrap-up session to blend the draft vision and mission statements into one statement, which is sent to the congregation for adoption. The brainstormed goals generated throughout the weekend are reviewed. The top suggestions are collated and then distributed to a strategic planning committee or the governing body for consideration in the formulation of a five-year strategic plan. The goals portion of the weekend can be focused on the specific needs of each situation – for example, they can be used to support a case statement for a capital campaign.

SFTF is based on Appreciative Inquiry (AI), a method of organizational planning that builds on strengths and successes. While the AI approach does enable an organization to work on issues and challenges, the process emphasizes the positives. Beginning with what is going well enables an organization to do more things well in the future.

The following definitions are used throughout *Searching For the Future*.

- **Vision:** A mental image of the organization in an ideal future state.
- **Mission Statement:** A concise, powerful, and moving description of the ministry of the organization, its reason for being, and its place in the world.
- **Goals:** Identified themes to be undertaken in support of the vision and mission.
- **Activities:** Specific projects, with measurable outcomes that support the vision, mission and goals of the organization.

### Preparation

#### *Promotion*

Good attendance is essential to give validity to the process and build momentum. To that end, publicity and promotion activities are crucial. Here are some thoughts and examples to consider:



- The lay leaders and professional staff must understand the purpose of the weekend and they must be openly committed to it. They must be willing to share that support with the rest of the organization. The minister(s) are encouraged to attend the Friday session and serve as cheerleaders.
- Begin promoting the weekend two months in advance, or as soon as possible.
- Be clear about the participatory nature of the process.
- Be clear about the time commitment. The facilitators devote three hours on Friday evening, three and a half hours on Saturday (morning or afternoon session), and two and a half hours on Saturday afternoon/evening or Sunday afternoon for a total of nine hours. The participants commit three hours on Saturday.
- Focus on the future. Many people have attended something similar (at least in their minds) that turned into a rehash of past events, particularly perceived failures. They fear that SFTF will turn into just another unsatisfactory experience. Make it clear that while we will acknowledge and build on the history, the focus will be on the future of this organization.
- Use testimonials from other organizations about SFTF.
- Use the newsletter and the Sunday bulletin for announcements. Encourage the leaders to be creative. One organization created a list of the top ten reasons to participate.
- Supplement the announcements with a telephone tree to personalize the invitation.
- Use email lists to invite members of the organization.
- Post a notice about the SFTF on your web site with a link to sign up.
- Ask members of the governing body and other relevant committees to promote SFTF during coffee hours, and have a registration table available.
- Include time for food and fellowship before each session. Morning sessions might offer coffee, juice, and muffins. Soft drinks, crackers, cheese, and fruit can be available at afternoon sessions. If evening sessions are scheduled, soup, finger sandwiches and non-alcoholic beverages can be provided.
- Provide childcare and transportation when needed.
- Equip each session with newsprint, markers, 3x5 note cards, and masking tape (that will not remove paint from the wall).

### ***Facilitators***

- Facilitators are participants during the Friday session, process leaders during the Saturday sessions, and participants in the wrap-up session.
- It is best to have two facilitators for each session, so they can divide the role of moderator and scribe, and support break-out groups.
- Facilitators can be recruited from among acknowledged leaders of the organization who are passionate about the organization. Facilitators should be comfortable leading groups and must have the ability to facilitate without offering visioning suggestions. They are responsible for the process, not the content developed during the session they are leading – they have had their chance to be participants during the Friday session.



### ***Sign-up Process***

Wide-spread participation is a key to success. Extensive publicity helps make the congregation aware of the process. They need to fully understand the process including their willingness to contribute 3 hours of their time. The more that people participate, the greater will be the degree of ownership of the mission statement and the goals that are generated by the weekend process.

Members should be able to call the church office or a designated member to register to attend a particular session. In addition, personal phone calls can be made to members and friends in the two weeks before *Searching for the Future* to clarify which session they wish to attend. These phone calls can also determine whether childcare is needed. These phone calls are likely to dramatically effect the level of participation. At the very least, the phone calls will increase congregational awareness of the process.

Shortly before the weekend, the names of those attending can be sorted into groups of 8-12 participants and assigned to specific facilitators. This process will help to determine how many facilitators will be needed for each time period. Groups work well when they represent the diversity of the congregation (age, gender, belief systems, etc.). It is suggested that family members be separated into different groups and youth be encouraged to participate.

On the Saturday of the *Searching for the Future* weekend, it will be necessary to have an on-site coordinator to welcome the participants and direct them to their rooms. Inevitably, there will be people expected but not showing up, and others showing up unexpectedly, and so there will need to be someone doing last minute changes to the groups.

Keep track of the numbers of those actually attending, so that you can report the numbers to the congregation afterwards.

For more information, contact: Barry Finkelstein, UUA Congregational Stewardship Consultant, at [barrypf@gmail.com](mailto:barrypf@gmail.com), 603-319-4911.