

3B Hedgerose Court
Asheville, NC 28805-1328
July 11, 2009

Claudia Barton, President
Conejo Vally UU Fellowship
Thousand Oaks, CA

Dear Claudia,

Thanks so much for your e-mail and the mostly completed intake form that Betty had sent to you at my request. As I'm guessing you are aware, this all started at General Assembly when Susan Dixon happened to come up to the Congregational Services booth at a time when I was helping staff it. She expressed concerns about where CVUUF is at the moment financially and I explained that I happened to be the consultant that had worked on your capital campaign process. This was clearly a very unusual coincidence that the two of us ended up together.

Later at GA I ran into the Staplefords and talked about the conversation with Susan. Out of that Betty asked that I send an intake form to her and she would tell you what was going on and send it to you, leaving any decision about further contact with me up to you, rather than me going straight to Susan and the stewardship committee with the information that I said I could send to her. I've explained this to Susan but it would be nice if you would share some of the enclosed information with the stewardship committee as you deem appropriate.

My hope is that this letter and the various enclosures will get things started. Based on what you wrote on the intake form it sounds like at least some of the topics to be discussed if you elect to have me do an Assessment Visit are the following:

- You're looking to build more generosity in the congregation – 09-10 Annual Budget Drive (pledge campaign) was essentially not executed
- You currently are in a deficit budget situation (due at least partially to the building effort)
- You are working on developing a new Strategic Plan
- There is little effort at bring in visitors
- You have difficulty in engaging members in growth efforts

You didn't raise this question but knowing something about the funding of the second building through the LLC, I'm guessing that there should also be some discussion about when you would plan to conduct a second capital campaign.

All of the above suggest this is an excellent time to have an Assessment Visit so that as a Fellowship you can see the big picture of where you currently are, look ahead to where you might like to go and determine what steps you need to take to get you there. Thus, below I am outlining how we might spend time together, including some information which might be helpful to your decision process and discussions. I'm also requesting lots of materials from you.

What need for workshop

- Room Setup -- "U" shaped tables and chairs or just chairs in semi-circle
- Fresh set of colored magic markers and easel pad – 27"x34" and 50-60 pages (**Not** Post-it)
- Easel Stand/Masking Tape
- Power Point Projector/lap top and screen
- Hot and cold drinks/ breakfast snacks to begin the day
- Arrange for lunch at the fellowship
- Childcare offered

Suggested Agenda

Friday

- I'll actually travel to LAX on Thursday but want to drive to Santa Barbara to see their completed building project that came out of the capital campaign I helped them with. I'll drive back to Thousand Oaks on Friday.
- Arrive early-mid-afternoon – tour the fellowship, meet with minister and any other key staff members as appropriate and do some work with the easel pad
- It would be great if I could meet then with the person who will handle the Power Point end of the operation to make sure it works (I'll e-mail it ahead of time so it can be set up and copied for handouts/note-taking)
- I am willing to accept home hospitality for Friday night only – non smoking but pets OK
- Dinner meeting with 5-6 key lay people and review plans for the workshop -- choices from among these – President, Stewardship Chair, Annual Budget Drive chair for 2010-11, a financial person, or others that make sense to you.

Saturday (Suggest either 9-3 or 10-4)

- Getting settled in
- Review your overall congregational situation/agreement/questions
- Steps you might consider re strategic planning, membership, generosity, etc.
- Lunch
- Continue "Steps" discussion, with emphasis on what needs to be done ahead of considering moving into the process that might lead to a second capital campaign
- The steps involved if you decide to do a capital campaign
- Review specific recommendations and develop a potential time table
- Q&A, Clarifications

It is highly encouraged that people attend the whole workshop. However, if people can only attend portions of it, you can see where my emphasis will be from the listing above. As to who should attend, I suggest the following, at a minimum, as appropriate to your situation: Board, Staff, Stewardship Committee, Finance Committee, Annual Budget Drive leadership, RE leadership and parents, Strategic Planning people, Endowment Committee, Membership Committee, plus other key committees you want or people who you want to be there. **The more people you can turn out, the better.** Advertise it to the whole congregation -- reservations requested. **But to succeed in turning out the people you want, the only sure way to do this is with personal invitations.** Have people understand this is much more than a financial workshop! I'd hope for an absolute minimum of 35 people with 45 or more being even better.

Information Requested (**Need 6-7 weeks ahead of the workshop**)

- Sunday service attendance – history
- RE Attendance – history
- Typical parking needs on a Sunday
- Capacity of current space: meeting room, fellowship area, RE classes, parking
- Master Site Plan
- Last 3 Annual Reports
- **End of the year** financial statements/ balance sheets – last 3 years – including budgets
- Explanation/details of the funding arrangements with the LLC
- Current Annual Budget and most recent Financial Statement for current year
- Current listing of annual gift commitments (pledges) in order (either high to low or low to high) with names and indicate which, if any, are Friends
- List of any members or friends who are not currently making annual gift commitments
- List of people who have joined since July 1, 2008 with joining date

- Annual Budget Drive materials for the last campaign and explanation of what caused the complications with the “non campaign”
- Endowment Fund Information
- Current Fellowship Directory
- List of Board, Committee Chairs, Staff, etc
- Mission/Vision statements -- even if old
- Any available information about what you might do to current facilities/property if you undertook a second capital campaign
- Other material which might help educate me about your congregation

I ask that you move forward in a timely fashion and send me the information quickly, as I may have lots of questions. **I suggest that you and the congregation plan to have this workshop be THE event on the calendar that weekend and that you work to get a big attendance.**

I have attached my Stewardship Vita so you can learn a bit more about me. If you have other questions regarding how our time together might work, don't hesitate to let me know. Also, for your own congregation know that the Presidents when I worked with you before were Dennis Weiher and David Barker, the Capital Campaign Chairs were Don Cooper and Susan Bray, and I also had lots of interaction with Todd Hess.

Because you are a UUA Fair Share Congregation you will be charged a flat fee of \$1000 for an Assessment Visit (It would be \$1500 if you were not Fair Share). For this fee you will get lots of prep work by me, time with staff and lay leadership on Friday afternoon and evening, a six hour workshop on Saturday and a written report following the workshop.

I am quite willing to have a phone conversation with you or other leadership if you have questions. Just let me know how you would like to proceed with this. Assuming that you would like to move ahead as soon as you can, let me suggest some September/October times *currently available* for you to think about, understanding that you will need to send me materials to allow me to have time for preparation:
 September: 18th-19th, 25th-26th
 October: at the moment – all of them

Sincerely,

Larry Wheeler
 UUA Stewardship Consultant

cc: Betty Stapleford, Minister
 Ken Brown, Pacific South West District Executive
 Wayne Clark, UUA Congregational Stewardship Services Program Director
 Jesse Holm, UUA Congregational Stewardship Services Program Administrator

