

Unitarian Universalist Church of Tampa
11400 Morris Bridge Road
Tampa, Florida 33637-1902

Confirmation Study Report for Proposed Building Project

Introduction. During the 1930s, both the Unitarians and the Universalists started congregations in the Tampa but neither survived. Then, in 1955, the Unitarian Fellowship of Tampa was founded as an outgrowth of an interracial Great Books Discussion Group. Initial meetings were held in rental space in south Tampa. In 1973, the congregation moved to its current property and built a geodesic dome. Most of the congregation made the transition from south Tampa. In 1980, the Fellowship was incorporated as Unitarian Universalist Church of Tampa.

During the next decade, the members and their minister, the Reverend Mike Young, were highly involved in social justice issues. Major efforts focused on affordable housing through the Housing Now organization and sustainable peace through the Tampa Coalition for Peace and Justice. The congregation also earned recognition from the UUA as a Welcoming Congregation.

In 1987, Suzanne Nazian was hired as the first director of religious education. The congregation sponsored her seminary studies and ordained her in April 1996.

Also in 1987, the congregation broke ground for a second geodesic dome. The completed structure had 5,600 square feet devoted to a sanctuary, three small offices, a nursery, and a kitchen. The sanctuary also doubles as a social hall.

The social justice activities continued through the 1990s which was a period of ministerial transition with both interim and settled ministers serving relative short terms. The church joined the interfaith Hillsborough Organization for Progress and Equality (HOPE) in 1991 and remains active today.

In the mid 1990s, the congregation held a capital campaign to purchase the adjoining property. The proceeds plus money borrowed from members added more than three acres to the site. The member notes will be paid off in 2010.

A Comprehensive Planning Committee was formed in 2000. It developed a plan for the future of the Church and engaged an architect to complete a master plan for the site including a series of new education buildings and a social hall. No further action was taken as ministerial leadership underwent another change.

The Church celebrated its 50th anniversary in 2005. The Reverend William Sinkford, president of the Unitarian Universalist Association, spoke at the anniversary dinner concluding the year long observation.

The Reverend Sara Zimmerman accepted the call to serve the Tampa Church in 2007. That same year, a new Planning Committee was appointed to review the previous work. Its report suggested that multi-purpose space for religious education and adult meetings should be the highest priority. The Building Design Team, with the help of a new architect, revised the master site plan and developed plans for a multi-purpose building as the first phase of this development. The building as proposed will contain about 3,550 square feet. The total project cost is estimated at \$700,000 to \$800,000.

This confirmation study was undertaken to determine the level of support for the proposed Phase I building program outlined above

Selection of Candidate Households. Working with the consultant, the Capital Campaign Steering Committee identified over 35 households who could be invited to participate in the study. The intent was to select a pool of potential interviewees that represented the congregation as a whole. The following factors were used to select candidate households: length of membership, age, children in the religious education program, involvement in the programs of the Church, household composition, and annual financial support.

After the selection of the pool, one member of the Steering Committee called to invite up to 27 candidate households to participate in the study. Some households declined to participate due to scheduling conflicts. No candidate households said they would not participate because they opposed to the project.

The Interviews. From January 27-29, 2009, the consultant conducted 25 interviews with a total of 35 individuals. One household who had been scheduled was unable to participate. A standard set of questions, drafted by the consultant and reviewed by the Steering Committee, was used for each interview. When a couple was interviewed, the views of each person were recorded separately. The data from these interviews form the basis for this report. See Appendix A for the questions.

The consultant introduced himself at the start of each interview as an UUA Consultant retained by the Church to determine if the congregation was ready to proceed with the proposed building program. He reviewed the purposes of the study:

- 1) Determine how well the proposed building program was understood.
- 2) Estimate how much money might be raised to support the project.
- 3) Identify any current issues that might detract from a capital fund drive.

Each interviewee was assured that, with two exceptions that would be noted, all responses would be confidential. Notes would be taken in order to prepare this report, but no names would be associated with any quote or other information.

The Sample. The interview sample consisted of 35 individuals representing 25 households. These households constitute approximately 28% of the 89 households

who made a financial commitment during the 2009 annual budget drive. Attachment B lists the persons who were interviewed.

Gender. The sample consisted of 23 women (66%) and 12 men (32%).

Involvement in Church Activities. All of the interviewees said they were frequently at the Church on Sunday mornings: 24 virtually every Sunday (excluding the summer) and 11 two to three times a month.

Membership Status. All 35 interviewees are official members of the Church. The sample included six (17%) who had been members for less than two years and six (17%) for over twenty years. The median was 6 to 10 years.

Table 1
Length of Membership

<u>Length</u>	<u>Number</u>
Less than two years	6
Two to five years	7
Six to ten years	10
Eleven to twenty years	6
Over 20 years	<u>6</u>
Total	35

Age. The individuals ranged in age from the early 30s to the mid 80s. The median, or midpoint, is in the 51 to 65 age group.

Table 2
Age of Individual Interviewees

<u>Age Group</u>	<u>Number</u>
Under 31	0
31 to 40	5
41 to 50	5
51 to 65	12
66 to 75	10
Over 75	<u>3</u>
Total	35

Children in the Religious Education Program. Seven (20%) of those interviewed had one or more children enrolled in the religious education program.

Involvement. Twenty-three (66%) serve on the Board of Directors or one or more committees of the Church. Those committees represented by two or more members are listed below. In addition, one member of each of the following committees was interviewed: Aesthetics, Communications, Concert, Disability, Endowment, Nominating, Policy and Procedures, Technology, and Worship.

Board of Trustees	5
Building Design	2
Caring	3
Finance	3
Fundraising	2
Interweave	2
Membership	6
Ministry	2
Planning	2
Religious Education	5

Experience in Other UU Congregations. Fifteen (43%) of those interviewed had been a member of another Unitarian Universalist congregation and sometimes several. Seven have been in other congregations in Florida. The rest were scattered along the Atlantic Seaboard and west only as far as Iowa.

Annual Income. The annual household income ranged from under \$25,000 to \$150,000. The median was in the \$50,000 to \$75,000 range; the most frequent (the mode) was in the \$25,000 to \$50,000 range.

Table 3

Annual Income of Interviewed Households

<u>Amount</u>	<u>Number</u>
Under \$25,000	2
\$25,000 to \$50,000	9
\$50,000 to \$75,000	4
\$75,000 to \$100,000	3
\$100,000 to \$150,000	7
Total	25

Conclusion. The consultant and members of the Board of Directors, the Building Design Team, and the Capital Campaign Steering Committee reviewed the demographic data at a meeting on January 30, 2009. This group believes that the sample is representative of the congregation as a whole. As a result, the findings can generally be extended to the whole congregation. Appendix C contains a summary of the demographic data.

PROGRAM INFORMATION

Attraction of This Congregation. Each person was asked what first attracted him or her to the Church. Many gave more than one reason so the responses reported exceed the number of persons interviewed.

Fifteen persons (43%) had been associated with other Unitarian Universalist congregations; 12 moved to the area, two transferred from a local UU church, and one had been active in the young group in Miami before moving to Tampa. Five (14%) were attracted by the values of Unitarian Universalism, particularly the openness to different religious perspectives. Four (9%) came because a friend invited them or recommended it. Three were looking for a safe church environment for their son or daughter. Three persons were part of couples who came from different religious backgrounds and thought the UU Church of Tampa was a place where they could be comfortable together. Two were attracted by the CUUPS group. Individual reasons varied from a desire for community to the minister. One person had dropped by casually and ended up in a two-hour conversation with the minister that convinced him/her that this was the right place. One had been married in a UU congregation, and after the first Iraq invasion, sought out a UU congregation. One met members while attending an event at the Church and eventually joined. Another said her/his first experience was like being in a family and that felt good.

Most Important Programs and Activities. The interviewees were asked to name the three programs or activities of the Church most important to them today. This question was intended to help them focus on how their commitment has changed over the years. The answers in Table 4 closely parallel those in other congregations for whom this consultant has done confirmation studies.

Table 4
Most Important Program or Activities

<u>Item</u>	<u>Number</u>
Sunday services	23
Volunteer activities	13
Small group ministries	8
Religious education	7
Sense of community	6
Interweave	6
Music program	5
CUUPS	5
Meditation group	4
Social events	4
Social justice activities	3
Adult education	2
Secular Humanist Atheist Agnostic Group	2

The next two questions were designed to determine what the individual thought about the current state of the Church by asking first about the most pressing need facing the congregation and then if they had any special concerns about any aspect of church life. In evaluating these responses, please remember that the respondent supplied his or her own answer rather than selecting items from a list. As with other questions, the respondents did not always limit themselves to a single answer so the responses exceed 35 in total.

Most Pressing Need. Twenty-four persons (69%) mentioned space needs as the highest priority. Of those, twenty talked about the space needs to be met in the proposed new multi-purpose building: more classrooms, more adult meeting rooms, more space generally. Three wanted to enlarge the sanctuary. One thought more parking was needed.

Other topics were also on the minds of the interviewees. Nine (26%) thought growth in membership was the most pressing need including two who specifically mentioned addressing the needs of new members. Six (17%) spoke about the need for major maintenance and rehabilitation for the large dome. Three (9%) supported a program of greater outreach to the Tampa area. Another three mentioned the need for increased support for the annual budget.

Special Concerns. Ten people (20%) had no special concerns about any aspect of church life. Six (17%) were concerned about the annual operating budget; four of those were worried about the impact of the current economy and two through it relied too heavily on special fundraising. Five (14%) thought more volunteers were needed; two of those persons were explicit that “more younger people were needed to work on building the community.” Three (9%) had some concerns about the skills and attitude of the director of religious education. Two (6%) were concerned about funding the building program in view of the economy. Two others wondered about the dynamics associated with growth in membership.

Several individual comments were made. One thought that leadership was not responsive to member complaints/suggestions; another thought that leadership pays too much attention to complainers. One cautioned that we not put on too much emphasis on contributions to the building program, as that pressure that might drive away some who felt they could not contribute.

The discussion of the most pressing needs highlighted the two related issues; membership growth and new facilities. The concerns expressed are typical of those heard in other confirmation studies. The overall sense of this consultant is that the members are well satisfied with the church leadership and programs.

SUPPORT FOR THE BUILDING PROJECT

The next series of questions was designed to determine how well the interviewees understood the proposed building project. The first question concerned participation in the planning sessions with the architect and/or the Building Design Group over the last several months. The next question dealt with the interviewee's familiarity with the preliminary plan and cost estimates. The last three in this sequence dealt with the best feature of the plan, the least important, and what might be missing. Interviewees had to answer these questions based on their personal knowledge of the plans. Thus, the responses represent not only opinions on the importance of elements of the project but also the level of knowledge these individuals had about the project. Finally, each person was asked to rate on a scale of 10 (highest) to 1 (lowest) the importance of the building expansion in the overall life of the Church.

Twenty-nine persons (83%) said they had participated in one or more of the meetings dealing with the preliminary design. Twelve (34%) reported that they were very familiar with the preliminary plans; 18 (51%) were familiar with them; four (11%) were aware of them; and one person was unfamiliar with the plans. Overall, more than 8 in ten (85%) were familiar or very familiar with the proposed building project. [NOTE: Five persons were not asked the follow-up questions because of their lack of familiarity with the plans. Therefore the percentages shown in the next three paragraphs are based on responses from 30 persons.]

Several interviewees did not restrict themselves to one answer when asked for the best feature of the plan. The top item (17 persons, 56%) was the flexibility of the space which made it possible to meet a variety of needs from religious education for children and youth to adult education to committee meetings. Seven (23%) thought the large room was the best feature. Another seven (23%) just noted the increased space generally. Three (10%) spoke of the accessibility features. Three (10%) liked the overall design. Two others (7%) cited the green principles involved in the design. Two (7%) mentioned more classrooms. One like the location of the new building. Another liked the integrated land use plan, and one liked the kitchen.

When asked what seemed least important in the preliminary design, 25 (71%) replied, "Nothing." Of those who mentioned a feature, four (13%) thought they could do without the lobby. One thought the building may be "too large for our needs." Another thought that four rest rooms were too many. One was concerned about the windows extending to the ground.

When asked if anything was missing from the plan, 15 (50%) responded "Nothing." Five (11%) mentioned more storage space. Four (13%) cited funds for rehabilitation of the two domes. Four (13%) commented on the kitchen; two thinking it was too small and two wanting industrial-grade equipment in it. Three (10%) mentioned the lack of an office for the director of religious education or at least a secure space for a telephone and office equipment that would be needed. Two wanted to know more about the planned use of outdoor space. Individual comments included: 1) add showers to serve conferences and the homeless; 2) a family life center with a gymnasium; and an extra toilet in the women's room.

Each individual was asked to rate the priority of the proposed building project in the overall life of the Church. A “10” was the highest rating and a “1” the lowest. The average was 7.5; the median was 8, and the mode was 8. The range was from 1 to 10.

The six persons rating the project as low priority (5 or less) were asked the reason for that rating. Two thought that the church would not grow sufficiently to support the new facility. One thought it too expensive and not compatible with the current architectural style. One thought that economic conditions made it unrealistic to try and raise the money now. One wanted to rehabilitate and expand the large dome before considering this new building.

Four persons volunteered the observation that they had confidence in the Building Design Team.

Summary. The responses in this section suggest that the project has been well managed. 83% of the respondents said that they had participated in one or more of the meetings about the master plan and Phase I. Over eight in ten (85%) were familiar or very familiar with the plans and 71% thought nothing in plan was “least important.” The list of items that were missing was fairly short. Some may even be accommodated in the final design. The rating of 7.5 shows solid support for the project but also reflects some doubts about the economy and the potential for major membership growth.

FINANCIAL FEASIBILITY

Indicated Pledge Amounts. Each household participating in the confirmation study was asked how much they expected to contribute towards the cost of the proposed building program. They were reminded that pledges to the capital campaign could be paid over a three-year period and that any pledge to the capital campaign would be over and above their financial support for the Church’s annual operating budget. The consultant also noted, in most interviews, that if the campaign proceeds on the current schedule, the first pledge payment will be due in July 2009 and the final payment in June 2112.

The consultant then offered ranges, starting with “\$100,000 or more” and working down in increments to “unsure” and “nothing.” All 25 households plan to make a gift to the capital campaign.

In similar studies, this consultant finds about 10% of the households interviewed unwilling or unable to give. Such is not the case in this Church. Even those who had reservations about the project and gave it a low priority in the overall life of the Church plan to contribute.

In total, 25 donor units indicated an amount that they planned to pledge to the building program; 12 chose one of the ranges and 13 mentioned a specific amount. The sum of the indications ranged from a high of \$216,800 to a low of \$185,800 with a median of \$201,300. Five donor units plan to make pledges of \$10,000 or more. The largest indication was \$50,000; the lowest was under \$1,000. The largest gift will probably be structured as an incentive and payments will be made in increments as the congregation’s total giving reaches specified levels.

A few of the donor households wanted to be sure that their funds would only be used for the proposed building project. The consultant noted that if the congregation were to make substantial changes in the scope of the project, he would recommend that each donor be asked to reconfirm their pledge before the project proceeded.

The consultant added a question to the interviews to see how much effect the economic decline in the latter half of 2008 may have had. Each donor unit was asked if the study had been done in the spring of 2008, would the amount of their gift have been different. Fourteen (56%) said, "Yes." Of those 14, nine would have been higher and five would have been lower. Eleven (44%) said the timing made no difference.

Financial Projections. There are at least five ways to estimate the amount that a congregation might raise in a capital campaign: 1) ratio of major gifts to total gifts; 2) ratio of operating pledges to indicated capital campaign pledges; 3) a quartile analysis; 4) a multiple of total operating pledges based on experience of other UU congregations, and 5) a multiple of the likely lead gift. This section uses each of the five methodologies to project the likely amount that can be raised in a capital campaign based on the data collected in the confirmation study.

Ratio of Major Gifts to Total Gifts. The first method is based on (a) the number of major gifts, (b) the size of the average major gift, and (c) the ratio of funds raised from major gifts to total funds raised in other capital campaigns. As noted earlier, five of the households interviewed indicated that they would make a major gift (\$10,000 or more). These gifts range from \$10,000 to \$50,000 with an average of \$29,000. The total is \$145,000. The consultant estimates that five more major gifts will occur in this capital campaign to produce another \$125,000 to \$145,000.

The major gifts estimates are calculated on the projected 10 gifts producing between \$270,000 and \$290,000. In this consultant's experience, major gifts have comprised between 50 and 60 percent of the total amount raised. If that were true for this Church, then the capital campaign, based on this estimating technique, would raise between \$450,000 and \$580,000.

Low estimate as 60% of total	\$ 450,000
Low estimate as 50% of total	\$ 540,000
High estimate as 60% of total	\$ 485,000
High estimate as 50% of total	\$ 580,000

Ratio of Indicated Pledges to Operating Pledges. A second estimating technique is based on (a) the capital pledges indicated and (b) the percentage of the total pledges to the operating campaign represented by those households. The 25 households in the confirmation study indicated that they would give a total of \$185,800 to \$216,800 with a mean of \$201,300. The 25 units have pledges to the Church's 2009 annual budget that represent 54.3% of the total. If the same ratio holds for the capital campaign, then the projected amount to be raised in the capital campaign ranges from a low \$342,000 to a high of \$399,000 with the mean of \$371,000.

Quartile Analysis. A third technique is a refinement of the one used in the previous estimate. It is a more sophisticated ratio process based on a quartile analysis

of giving in the Church's annual budget drive. The annual commitment is weighted in each quartile against the amounts that the households indicated they were planning to give to the capital fund drive. By totaling the amount that the households give to the operating budget and dividing it into the amount that they plan to give to the capital campaign, a multiplier is determined for each quartile. The projections for each quartile are added together to determine the basic range of potential giving to the capital fund drive. In this confirmation study, the dollar amount for each quartile was \$29,500. This technique produces a low estimate of \$333,100 and a high estimate of \$406,400 with a mean of \$369,800.

Comparison with Other Congregations. In capital fund drives over the last three years, most congregations assisted by UUA Consultants have reported raising 2.5 to 5.0 times their current operating pledges. When the project involves a new facility or a major addition to an existing facility, the ratio tends to be in the higher range. When the project involves only deferred maintenance, the ratio tends to be at the lower end.

The Church's current operating pledges total \$118,000. This project is addressing real space constraints that the congregation has recognized. See earlier comments about the importance of the project. On that basis, the consultant has used ratios of 3.5, 4.0, 4.5, and 5.0 times the current operating pledges to make these estimates.

Current pledge base times 3.5	\$413,000
Current pledge base times 4.0	\$472,000
Current pledge base times 4.5	\$531,000
Current pledge base times 5.0	\$590,000

Lead Gift Analysis. Normally in a capital fund drive, the largest gift will represent 10% of the total that will be raised. The confirmation study identified two gifts in the \$45,000 to \$50,000 range; the larger gift is based on an incentive giving structure that will require the congregation a level of at least \$450,000 to qualify for the full gift. It is also likely that an additional gift in this range will be made.

It seems likely that the lead gift will be \$50,000 which suggests that the capital campaign will raise \$500,000.

Table 5
Summary of Estimates of Capital Campaign Results

<u>Method</u>	<u>Low</u>	<u>Middle</u>	<u>High</u>
Major Gifts	\$ 450,000	\$485,000 to \$540,000	\$ 580,000
Pledge Ratio	\$ 342,000	\$ 371,000	\$ 399,000
Quartile Analysis	\$ 333,100	\$ 369,800	\$ 406,400
Other Cong.	\$ 413,000	\$472,000 to \$531,000	\$ 590,000
Lead Gift	\$ 500,000	\$ 500,000	\$ 500,000

Overall, the estimates range from a low of \$333,100 to a high of \$590,000. The low estimates are clustered in the \$333,100 to \$413,000 range. The high estimates range from \$531,000 to \$590,000. Disregarding the lowest and highest estimates leaves a range of \$450,000 to \$500,000.

Persons Outside the Congregation. Your consultant asked each person if there were someone outside the congregation that we should approach for a capital campaign contribution. A number of individuals were suggested. These names will be forwarded to the Chair of the Capital Campaign Steering Committee for evaluation and follow up.

Wills. As part of the long-term financial planning for the Church, each person was asked if she or he had a will, and if so, had the Church been included in it. Two persons were not asked this question because of the way the interview had progressed so the maximum response is 33. Twenty persons (61%) have wills; five (15%) have included the Church in their wills. Those who had no will or had not included the Church were asked if they would like to attend a retirement planning seminar that would include information about how to include the Church in their planning. Twelve individuals said that they would. Those names will be provided to the Capital Campaign Steering Committee for follow-up.

The percentage of persons with wills is below average, based on previous confirmation studies by this consultant. The percentage that has included the Church in their wills is also low.

Volunteers. The next question dealt with the volunteers that would be needed for a capital fund drive and if they would help if the congregation voted to go ahead. Fifteen (43%) volunteered to do in-person visits for the capital campaign; four offered to help with social events; one with telephoning; four with office work; and two with writing and editing. These names will be provided to the Chair of the Capital Campaign Steering Committee.

STRENGTHS AND AREAS NEEDING ATTENTION

The final two questions gave the interviewees an opportunity to talk about the congregation generally. The consultant introduced the questions by saying that he liked to build a capital fund drive on the strengths of a congregation and at least be aware of any areas that might need attention. Again, it is important to remember that the interviewees volunteered these answers, and many had more than one response for each question.

Strengths of the Congregation. Two things stood out in the responses to this question. The new minister is well liked and considered to be a real strength of this church by 18 persons (51%). The second was the sense of community and the positive energy that was flowing through the congregation; the former was mentioned by nine persons (26%) and the latter by five (14%). As one interviewee observed, "The members are more excited than I have seen them in a long time." A second echoed the

sentiment: “The very idea of the new building is providing impetus and energy I have not seen before.”

Six persons (17%) noted the diversity of membership, one explicitly mentioned that the Church was a “safe, loving place for gay men, lesbians, bisexuals, and transgendered persons.” The lay leadership was cited by five (14%). Four thought the director of religious education was a strength. Three cited the Unitarian Universalist principles. Another three cited the CUUPS program. Two noted the recent marketing campaign, and two more the religious education program for children and youth. Single mentions included the choir, the music program, acceptance of people on different spiritual paths, meditation groups, and the natural physical setting.

Areas Needing Attention. The second half of the question asked what areas of congregational life, if any, needed improvement. Twelve (34%) offered no suggestions.

These comments are not easily categorized. Many were directed to additional programming: a small group ministry based on health; a planned giving program; the possibility of two services; a church directory; and more parking.

Others thought improvements could be made in the religious education for children and youth, communications, and pastoral care. Other suggestions related to the maintenance of the building and grounds, the removal of the chalice hanging behind the pulpit, and removal of the Christmas lights still hanging from the balcony.

Three areas mentioned deserve some closer attention. First, there may be some barriers to the full participation of young families. The structure of the religious education program apparently does not address the needs of pre-kindergarten children. Also, there is no cry room so parents tend to bring babies into the service where they may become a disruption. Child care is not always available for committee and other meetings. The second point is leadership development. There is a perception that relatively few members shoulder the load of leadership which tends to lead to burn out. Finally, the members will likely want to have a projection of the costs of operating the new building including any possible mortgage.

FINDINGS

1. The Unitarian Universalist Church of Tampa is a healthy congregation that seems to be meeting the hopes and needs of its members very well.
2. The households interviewed were representative of the congregation as to household composition, length of membership, age, gender, participation in Church activities, family income, and persons with children in the religious education program.
3. The proposed building program is very well understood and supported with some suggestions for improvement. The priority given to the building project in the overall life of the Church averaged 7.5 on a scale with 10 as the highest and 1 as the lowest. The most frequent rating (the mode) was 8. These ratings are

consistent with those in other studies where congregations went on to hold successful capital campaigns.

4. All 25 households interviewed plan to make a gift to the capital campaign. In similar studies, this consultant finds about 10% of the households interviewed unwilling or unable to give. Such is not the case here.
5. The sum of the 25 donor indications ranged from a high of \$216,800 to a low of \$185,800 with a median of \$201,300. Five households indicated pledges of \$10,000 or more. The largest indication was \$50,000; the lowest was under \$1,000.
6. The indicated financial support for the building project from current members is most likely between \$450,000 and \$500,000, based on five different estimating techniques.
7. Some households were concerned about what might happen to their pledges should the congregation make a substantial change in the building project.
8. The congregation will want to see the projected operating costs for the new building including the costs associated with a possible mortgage.
9. Some barriers may exist to attracting and retaining new young families. The religious education program may not be structured to meet the needs of three and four year olds. Child care for meetings as well as social events may be necessary for these folks to accept roles in the leadership of the congregation
10. Fifteen persons volunteered to be visiting stewards and another 11 offered to help in other areas of the proposed capital campaign. This level of volunteering, quite high in comparison to other confirmation study results, suggests that the congregation is committed to having a capital campaign.
11. Five of the 35 persons interviewed have included the Church in their will. Twelve expressed interest in attending a session on retirement planning that would also include information about testamentary gifts to the Church.

RECOMMENDATIONS

1. Proceed with the capital campaign in the spring of 2009 and set the goal at \$500,000, the median level suggested by the confirmation study.
2. Set the pledge payment period to start on July 1, 2009. and end on June 30, 2012. These dates will assure that the congregation will have approved the scope of the project before the first payment is required.

3. Emphasize that should the congregation adopt a substantial change in scope to the building project, all person making pledges will be asked to confirm their commitment to the revised project.
4. Develop an estimate of the operating costs associated with the new building and make it available to the congregation before the special congregational meeting to authorize the capital fund drive.
5. Establish a task force to identify the potential barriers to the full participation of young families in the life of the Church and to recommend solutions.
6. Prepare a leadership development plan that will identify members with the skills and interests to become future leaders of the congregation. The plan steps to these members involved in the various leadership training opportunities at the cluster, district, and national level.
7. Enhance the work of the Endowment Committee to develop additional legacy gifts to the Church. Hold a retirement planning seminar for members, led by local professionals, in the fall of 2009 after the capital campaign has been completed.

David L. Rickard
UUA Congregational Stewardship Consultant
February 7, 2009

Appendix A

Questions for the Confirmation Study Proposed 2009 Capital Campaign

Introduction. “I am Dave Rickard, the UUA Congregational Stewardship Consultant who has been working with your leadership on the proposed building program. You are part of a representative sample of the congregation that I am interviewing to determine if we are ready to go ahead with the capital campaign. Your opinions and ideas will enable me to make recommendations to the Board of Directors. I am using a standard set of questions in every interview. Your answers are completely confidential except where noted. I will, however, make notes from which to compile my report.”

1. How long have you been associated with the UU Church of Tampa?
____ years Are you a member? YES ___ NO ___
2. What first attracted you to this Church?
3. Have you been a member of another UU congregation? YES ___ NO ___
If so, where?
4. This Church offers a number of programs and activities for its members and friends including but not limited to Sunday worship, religious education for children, youth and adults, social justice activities, and social gatherings. What three programs or activities are most important to you today?
 - a.
 - b.
 - c.
5. From your perspective, what is the most pressing need of this Church today?
6. Do you have any special concerns about any aspect of Church life?
7. The preliminary plans for the new building have been developed in response to the needs the members of the congregation identified during the planning process. I have several questions about your understanding of those plans.
 - a. Did you participate in any of the meetings with the architect and/or Building Design Team? YES ___ NO ___
 - b. How would you characterize your knowledge of the proposed building plans?
Very Familiar _____ Familiar _____ Aware of them _____ Unfamiliar _____
 - c. What is the best feature of the plan?
 - d. What seems least important to you?
 - e. What, if anything, is missing from the building project?

8. On a scale of ten (highest) to one (lowest), what priority do you assign to the building plan in the overall life of this Church?

(If the answer is 5 or lower, then ask) What items rank higher in your mind?

I am going to ask a series of questions about finances; your answers will enable me to estimate the congregation's capacity to finance the proposed building modifications.

9. Currently, about 85 households annually provide financial support for the Church. How many of those households do you think would make a major gift of \$10,000 or more to the Building Campaign, payable over the next three years, in addition to their annual support for the operations of the Church?

10. If you were asked to invest in the new building today, payable over the next three years, in which of the following categories would it likely fall? This is not a commitment, but your honest answer will help me make an informed estimate of the Church's capacity to support the proposed building plan.

\$100,000 or more ___	\$50,000 to \$99,999 ___	\$30,000 to \$49,999 ___
\$20,000 to \$29,999 ___	\$15,000 to \$19,999 ___	\$10,000 to \$14,999 ___
\$7,500 to \$9,999 ___	\$5,000 to \$7,499 ___	\$3,000 to \$4,999 ___
\$1,000 to \$2,999 ___	Under \$1,000 ___	Unsure ___ Nothing ___

11. [If the answer is unsure or nothing, I will ask:] Will you share with me the reason for your answer?

12. If I had asked this question last spring, would your answer have been different?
YES ___ NO ___ If YES, HIGHER ___ or LOWER ___

13. Is there someone outside this Church that we should approach for a building campaign contribution? A former member? A parent?

14. In planning for the long-term financial health of this Church, I am asking each person about their estate planning.

Do you have a will?	YES ___	NO ___
Have you included the Church in your estate planning?	YES ___	NO ___
Would you like more information about how to do that?	YES ___	NO ___

15. A lot of volunteers are needed to run a capital campaign.

Would you be willing to talk to up to four other Church members and receive their gifts? YES ___ NO ___

Would you be willing to do other essential work?
Office work ___ Social events ___ Telephoning ___ Writing and editing ___ Other ___

16. What are the strengths of this congregation, the things that are going well?

17. What areas of congregational life, if any, need some attention?

Finally, a few questions to verify the demographics of this sample.

1. How often do you attend Sunday services?

Almost every Sunday ___ 2-3 a month ___ Once a month ___ Infrequently ___

2. Do you have children enrolled in the religious education program?

YES___ NO___

3. Do you serve on the Board or a committee of the Church? YES___ NO ___ If yes, which one(s)? If NO, ask had you previously served on the Board or a committee of the Church?

4. Gender: Female ___ Male ___ (I will not ask this but make my note here.)

5. What is your age?

Under 30 ___ 31 to 40 ___ 41 to 50 ___ 51-65 ___ 66-75 ___ Over 75 ___

6. What is your annual household income?

Under \$25,000 ___ \$25,000 to \$50,000 ___ \$50,000 to \$75,000 ___
\$75,000 to \$100,000 ___ \$100,000 to \$150,000 ___ \$150,000 to \$250,000 ___
\$250,000 to \$500,000 ___ Over \$500,000 ___

David L. Rickard

UUA Congregational Stewardship Consultant

January 15, 2009

Appendix B

Persons Interviewed for Confirmation Study

Betts, Pam and Rod Martin
Blymiller, Harriet
Cook, Ann
Davis, Ken and Mel
Delacroix, Rom
Dorman, John and Kathy
Drelles, Nicole and Sasha
Formica, Joyce
Francis, Mary
Hall, Jay and Tempie Taudte
Hendrickx, Jamie and Chris
Hines, Carolyn
Holloway, Gloria
Hunter, Don
Kirchheimer, Ronnie and Jay
Lehman, Judy and Ralph
Lund, Joan and Gene Pizzo
McCracken, Patricia
McKenzie, Kaarla
Noori, Afsaneh
Parrish, Lynn
Patterson, Russell and Candy Gale
Richardson, Felice
Siegel, Suzie
Tickell, Cyn

Appendix C

Demographic Data from Confirmation Study January 27-29, 2009

Number of Interviews: 25

Number of Persons Interviewed: 35

Members: 35

Gender:

Female 23
Male 12

Length of Membership

Less than 2 years 6
2 to 5 years 7
6 to 10 years 10
11 to 20 years 6
Over 20 years 6

Age of Members

Under 30 0
31 to 40 5
41 to 50 5
51-65 12
66-75 10
Over 75 3

Had Been Member of Another UU Congregation

YES: 15
NO: 20

Attend Sunday Services

Almost every Sunday 24
2-3 per month 11
Once a month 0
Infrequently 0

Children Enrolled in Religious Education Program

YES	7
NO	28

Serve on Church Committee

YES	23
NO	12

Annual Household Income

Under \$25,000	2
\$25,000 to \$50,000	9
\$50,000 to \$75,000	4
\$75,000 to \$100,000	3
\$100,000 to \$150,000	7
\$150,000 to \$250,000	0
\$250,000 to \$500,000	0
Over \$500,000	0
Refused to answer	0

David L. Rickard
UUA Congregational Fundraising Consultant
January 30, 2009