

ASSESSMENT VISIT REPORT

Name of Congregation: Unitarian Universalist Church of Tampa
11400 Morris Bridge Road
Tampa, FL 33637-1902
(813.988.8188)

Minister: The Reverend Sara E. Zimmerman
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President: Diana Stevens
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Contact Person: Ara Rogers
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Number of Members: 113
Annual Pledge Income: \$115,243
Average Pledge Per Member: \$1,020
Mortgage: none

Number of Pledge Units: 78
Annual Budget: \$150,231
Median Pledge: \$500
Promissory Notes due 2010: \$63,033

Operating Reserves: unclear
Corley Gift (unrestricted) \$13,367
Depreciation Reserve: \$21,882
Calendar Fiscal Year

General Endowment: \$43,069
Promissory Note Reserve: \$33,629
Donor Restricted Funds: \$17,384

Nature of Annual Stewardship Campaign: The church held cottage meetings with two presenters at each. People were asked to pledge at that time. The report indicates limited attendance. In previous years, the person to person approach was used. Despite the success, the operating budget still requires \$20,000 in special fundraising activities to be in balance.

Date and Purpose of Last Capital Campaign: The last capital campaign was in 1985-7 to help build the second dome. Most of the funds for that project came from the sale of a portion of the land to the state highway department and from member notes

Status of Vision and Mission Statement and Strategic Plan: Yes, and a current comprehensive plan that needs to have financial projections and a Membership Development Plan added to become a strategic plan.

Actions to Increase Inclusivity: No response.

UUA Consultants in Last Three Years: None except for the ministerial search process that successfully concluded in 2007.

Proposed Project and Estimated Cost: A master plan in 2000 showed a second RE building of 3,000 square feet, then another 2,000 square foot building, a fellowship hall. a circulation area among the four buildings, and finally infrastructure updates. Total cost at the time was estimated at \$500,000 to \$600,000, figure that seems low by today's conditions.

Steps Taken to Prepare for This Project: Completed the comprehensive plan.

Recommendations: I have five recommendations for the congregation.

1. Review the program statement that was developed to support the master plan in 2002. Update the elements that need updating and submit for congregational approval.
2. Add financial projections and a Membership Development Plan to the Comprehensive Plan to understand better the financial commitments to a building program and potential mortgage.
3. Reduce reliance on special fundraising events to support the operations of the church. Two of the annual events apparently draw from the larger community and provide significant outreach opportunities. However, the funds from those events might be reserved for one-time expenditures such as major maintenance projects or starting new programs.
4. Upon approval of the revised program statement, hire an architect to review the master plan and develop preliminary plans and cost estimates for a Phase I building project.
5. Plan to hold a capital campaign in the spring of 2009 with the potential goal of raising \$500,000, subject to the findings of the financial confirmation study.

Consulting needs. I have outlined the projected consulting needs in the attached tentative schedule for a capital campaign. It shows a total of 14.0 consulting days at a cost of \$760 per day for a total of \$10,640.

David L. Rickard
UUA Congregational Stewardship Consultant
March 17, 2008

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Tentative Schedule for Combined Campaign

The tentative schedule for the combined capital and operating fund drive is based on the discussions during the Assessment Visit March 10-12, 2008. The estimated consulting days are indicated in parentheses. They total 14.0 days at a cost of \$760 per day for a total estimated cost of fundraising consulting assistance at \$10,640.

2008

March 10-12 Assessment Visit

March 31 Board appoints Architect Selection Committee

April 30 Architect Selection Committee issues Request for Qualifications to local architects with responses requested by May 19, 2008

April 30 Planning Committee issues revised Architectural Program Statement for congregational review.

May 10 Board appoints Building Design Committee and Capital Campaign Steering Committee.

May 14 Consultant visit to meet with Building Design Committee and Capital Campaign Steering Committee (1.25 days)

June 8 Congregation asked to approve Architectural Program Statement presented by the Board and Planning Committee and to authorize the Board to hire an architect to revise the master plan as necessary, develop preliminary plans and cost estimates for Phase I construction.

June 18 Architect Selection Committee recommends architect to Board. Board approves and appoints a Building Design Committee to work with architect on the design tasks noted above.

June 15 Contract signed with selected architect to work with Building Design Committee to revise master plan as necessary and develop Phase I preliminary design and cost estimate.

August 21-2 Consultant visit to review plans for the Annual Budget Drive and the work of the Building Design Committee. (1.5 days)

- Sep. 14 Building Design Committee presents revised master plan and Phase I plans to congregation.
- October 5 Congregational Meeting asked to endorse the master plan and Phase I plans and to authorize financial confirmation study.
- October 13 Consultant visit to help select households to be invited to participate in the financial confirmation study. (1.25 days)
- Nov. 1-4 Consultant conducts up to 24 interviews for Confirmation Study. (6.0 days including up to 2.0 days for report writing)
- December 7 Congregational meeting to authorize the capital fund drive and set its goal.

2009

- January Consultant visit to review status of capital fund drive plans. (1.25 days)
- March Capital Campaign Kickoff Event
 Consultant visit to train capital campaign visiting stewards. (1.5 days)
 Board appoints Building Committee to oversee construction.
- May Consultant visit to close out capital campaign and help plan next steps. (1.25 days)
- June Congregational meeting to authorize final drawings and construction for Phase I.
- Fall Construction could begin, depending on permits required.

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Committees for the Capital Campaign Process

This list shows the various committees that are normally used in the Capital Campaign process, their recommended size and tenure, and their responsibilities. The dates and times are tentative, based on the information developed during the Assessment Visit. In the early stages, several committees are working concurrently. If we were to do it all linearly, i.e. delay the Architect Selection Process until the Architectural Program Statement is adopted, we would add up to six months to the process.

Planning Committee (PC)

Membership: Five Tenure: through May 2008; annual review

- Develop financial projections to supplement the Comprehensive Plan.
- Prepare a Membership Development Plan to show how the congregation intends to attract and integrate new members and how the plan to retain existing members. Since the finances of the congregation depend so heavily on financial commitments from members, this plan provides the basis for many of the financial projections noted in the first task
- Present revised strategic plan to the Board for approval.
- Maintain the strategic plan by updating annually.
- Review previous Architectural Program Statement and update it as necessary to reflect the changes since 2000. Present the Statement to the Board and ultimately to the congregation for approval.

Architect Selection Committee (ASC)

Membership: Three Tenure: April 2008 through June 2008

- Develop list of candidate firms and individuals.
- Prepare preliminary information about the project to send to candidates in conjunction with the Planning Committee and release a Request for Qualifications to candidate firms and individuals.
- Request each interested party to submit a Statement of Qualifications and estimated cost for revising the master plan and preparing preliminary plans and cost estimates for Phase I.
- Evaluate responses and select three to five firms/individuals for interviews.
- Recommend firm/individual to the Board.

Building Design Committee (BDC)

Membership: Five Tenure: June 2008 through October 2008

- Work with architect to evaluate the current master plan and revise as necessary to meet the needs identified in the Architectural Program Statement.
- Develop preliminary drawings and cost estimates for the Phase I building proposal.
- Present the Phase I information to the congregation for its endorsement.

Capital Campaign Steering Committee (CCSC)

Membership: Seven Tenure: April 2008 through June 2008

- Develop publicity and education plan.
- Select persons to be interviewed for the financial confirmation study.
- Develop brochure for campaign.
- Plan campaign including Kickoff Event.
- Organize face-to-face canvass.
- Establish record keeping and billing system for capital campaign pledges.

Construction Committee (CD)

Membership: Seven Tenure: June 2008 to completion (estimate 18-24 months).

- Evaluate and recommend contractor(s) to the Board of Trustees.
- Work with architect on final drawings and bid documents.
- Work with architect on necessary permits and governmental approvals.
- Evaluate bids and recommend contractor to the Board.
- Oversee the construction.

NOTES:

1. For purposes of continuity, it is a good idea to have at least one member of the Architect Selection Committee and one from the Building Design Committee serve on the Construction Committee.
2. Members should be selected with several factors in mind:
 - Representation from major groups in the congregation.
 - Persons recognized as leaders in the congregation.
 - Special skills needed on the committees.
 - To the extent possible, a balance on males and females, long term and newer members, and similar factors.

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UUA Congregational Stewardship Consultant
March 17, 2008