

Unitarian Universalist Fellowship of Centre County

780 Waupelani Drive Extension, State College, PA 16801

**FEASIBILITY STUDY SUMMARY FOR
THE PROPOSED FIRST STAGE OF THE MASTER BUILDING PLAN**

CONGREGATIONAL HISTORY

UUFCC was organized in 1950 in the early days of the fellowshiping movement. From the beginning it has placed high value on being an effective, visible liberal religious community and voice in State College. It currently has both very long and short term members that keep it grounded on its original purpose while being an exceptionally energetic intergenerational congregation. One quarter of the congregation's members joined over 20 years ago (the longest current member joined in 1955) while over 50% of current members have joined since 1999. One in five members has joined in the last two years.

The congregation reported 214 members and 62 children's religious education enrollment when it moved into its present building in 1991. Due to cost constraints, other than the sanctuary, the current space was mostly built to the size and activity level of the congregation at that time.

PRESENT SITUATION.

The current website banner reflects that UUFCC is a warm, welcoming, active congregation:

Come as you are. Find fellowship. Share the journey. You will be welcome here!

The congregation has experienced slow if not significant growth since moving into the current facility in 1991. Current membership is 263 (+23%); current RE enrollment is 70 (+13%). The Board believes all spaces, except for the sanctuary, are too small due increased use and significant need for in room storage.

In 2005 the congregation hired an architect to develop a master plan for expanding space in all areas except the sanctuary. In April 2007 the congregation contracted with Frankie Price Stern, a UUA Stewardship Consultant, to assist with stewardship and the steps toward a possible capital campaign. Recently after significant governance changes and the adoption of a new long range plan, the congregation felt ready and voted to move ahead.

In September of this year the building team proposed the "First Stage of the Master Plan" which was estimated at \$1.1 million dollars. This plan is for a separate 4600+ sq. ft building parallel to the existing RE wing and separated from it by a courtyard. The two buildings are to be connected across the courtyard by one or two covered walkways. The space adds six classrooms each of which is 25% to 40% larger than the existing "intimate" small classrooms. The plan also includes child, adult and accessible restrooms, and in-room and convenient access storage as well as unheated basement storage. An additional space which will eventually be a larger kitchen will be built but not up fitted one classroom in the existing wing will be lost to provide an exit to the new building and some small classrooms will be converted to offices for staff. The energy efficient and other "green" features of the plan have yet to be decided and listed.

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WHAT IS A FEASIBILITY STUDY

This Feasibility Study report answers important questions that must be asked before launching a capital campaign. It provides information about attitudes within the congregation, and it indicates the general health of the congregation and its ministry. And finally, it gives an accurate picture of the congregation's willingness to financially support the proposed plan.

As an external consultant, I provide an objective set of eyes and ears. Because of this objectivity and because of the confidential nature of the process, I can elicit direct and honest answers to these important questions.

Carefully selected interviewees were asked a series of questions previously suggested by the consultant and added to by church leadership. The questions focused on:

- Determining their knowledge of the proposed project,
- Discovering their questions and/or concerns about the project in particular and the congregation in general
- Their willingness to financially support the proposed project.

My great thanks to the 54 Interviewees below for their time and their thoughtful, complete and honest answers to my questions. I am also thankful for the interesting good side conversations that made all 39 interviews in 5 days enjoyable experiences:

Bob & Judy Andronici

Brenda Black

Cheryl Bohn

Laura Brown

Sean & Sarah Cook

Art Curtze

Nancy Davis

Helen Dempsey

Francisco & Sarah Diaz

Peg Dobrinska

Daryl & Lois Durran

Carolyn Wilhelm

Mary Alice & Reinhard Graetzer

Tony Guerrero

Bev Henshaw

Deb Hopkins

Barbara Hunziker

Elaine & Peter Jurs

Donna Kempf

Andy & Elaine Lau

Paula Marden

Wayne Osgood

Laurie Parmele

Paula Ralph

Amanda & Andy Richards

Herman & Jane Richey

Ken Riznyk

John Schmidt & Sara Schumacher,

Barbara & Bob Seibel

Jim Serene

Ron & Sue Smith

Michal Stump

Roxanne Toto & Suzanne Weinstein

Carl & Helen Volz

Betty Walker

Darlene Weener

Eileen Wise

Jan Wuest

Arian & Patty Zarkower

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FEASIBILITY STUDY SUMMARY FOR THE PROPOSED FIRST STAGE OF THE MASTER BUILDING PLAN

FINDINGS SUMMARY

I found UUFCC to be a generous fellowship with no issues standing in the way of moving forward to a capital campaign. Based on the all the information gathered in the interviews, this consultant supports a capital campaign in the fall of 2010 to raise funds to build your First Stage Plan.

I estimate that a well run capital campaign could raise between \$600,000 and \$900,000.

A 7% 20 year mortgage with an affordable debt service payment of 10% of your annual budget could be \$240,000. So, a building plan of \$840,000 to \$1,140,000 should be affordable. Based on the interview responses, I suggest a basic plan of \$900,000 with a stretch plan of \$1,100,000 be presented to the congregation.

HOWEVER::

The whole congregation will need more information and involvement to achieve the wider support you must have to achieve your financial goals. A case statement document is planned to be available January or February. You will need to include:

- A clear statement of the needs for the additional space and the uses of all classroom and office space once the first stage is completed
- A clear summarized statement of your long range financial plan explaining and verifying the affordable financing of the construction and the affordability of the ongoing budget increases for the mortgage and the additional space ownership costs
- A list of all affordable energy efficient features for the first stage plan, and other green additions that could be affordable in the stretch plan

About two in five interviewed households are considering giving stock or other appreciated assets. I recommend the congregation swiftly put in place policies and procedures to allow your members to easily do this.

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FEASIBILITY STUDY SUMMARY FOR THE PROPOSED FIRST STAGE OF THE MASTER BUILDING PLAN

KEY FINDINGS

1. Overall 85% of the interviewees were familiar or very familiar with the Master Building Plan, and two thirds (68%) were familiar or very familiar with the proposed First Stage of the Master Building Plan. About one out of three was only aware of or unfamiliar with the First Stage.

Having a strong and energizing publicity plan during the next 12 months will continue to improve these good so far results. A strong and inclusive publicity plan will be key to your ability to achieve you goals.

2. Members of UUFCC have interest in and place importance on multiple activities. Few interviewees mentioned just one and many three and four. For many, interests are intergenerational. Importantly over half of those who gave interest and importance to children and youth religious education are over 50 and five of the thirteen households with someone involved in RE do not have children in RE. Community building and social activities received the highest interest at 54%. This was followed at the 30%+ level by Children's RE, Sunday services, social action and operations. Adult RE and music each was valued by a high 26% (1 in 4) of interviewees.

Since the planned building will be for intergenerational and multiple use, I suggest the capital campaign include publicity and events celebrating the intergenerational community you are.

3. More than one half of those interviewed said adding RE classrooms was the best feature of the first stage plan with about one quarter specifically mentioning the larger sizes of the classrooms. Less than one in three mentioned all purpose activity space as a best feature.

Other best features mentioned were the courtyard, improving Sunday morning timing, new/larger staff offices, increasing rental space income, providing community space within State College, and the new space being planned to match the existing building design.

It is important that changes to the usage of the existing spaces and the full value and all uses of the new space be clearly communicated and understood.

4. When asked if anything was missing from the first stage, 23 out of 54 responded "Social Room" – 10 were "very concerned" or "concerned" – 13 said they were "not very concerned" or they would "like to see it in the 2nd stage". Concern was also strongly expressed about the need for one single large room for 20 to 30 people, the new space not being physically connected to the existing building, having external doors in all classrooms, and a having a clear financial plan.

Support for the plan will be widened by addressing each of these concerns either by changes to the plan or clearly explaining the reasons for not making changes. The financial plan is a recommendation in the Findings Summary above.

5. Each individual was asked to rate the priority of the first stage building plan with "10" as the highest rating and a "1" the lowest. 73% rated it 7 or higher. The median was 8 and the overall average was 7.4. The plan clearly has a high priority for three quarters of those interviewed -- five of these were concerned that focusing too much the building process would impact the important

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mission based activities of the Fellowship, and two were concerned that the congregation was not growing as expected

Significantly, one in five rated the plan's priority 5 or below. Reasons for lower ratings were: not liking the plan as presented, not believing it was sufficiently energy efficient, financial stability concerns, and not believing the additional space was needed.

No congregational health issues were raised. Most of the given concerns can be addressed by providing more and clearer information in the Case Statement.

6. Thirty four households (87% of those interviewed) plan to make a pledge to the first phase of the master plan. Based on the consultant's prior experience, this is a very good level of support at this stage in the capital campaign process. Only one household does not plan to pledge because of not liking the plan as presented, and one will not give because of concerns about the financial condition of the fellowship. Due to personal financial concerns two will not give and another was unsure.

No congregational health reasons for not giving were mentioned. .

7. Just over one in four (28%) households responded that if the economy continues to improve their pledge could be higher. The median increase was 5% -- two responses were significantly higher.

The Fall 2010 timing of the capital campaign request for pledges remains the best plan.

8. Eight of the households interviewed (one in five) said that they could be inspired to raise their financial support of the plan. Most mentioned having more "green" features especially energy efficiency; others mentioned possibly addressing the social space overcrowding, and gaining wider congregational support.

As stated above in the findings summary, having a "green" strategy for the first stage of the building plan is a significant key to the level of support of many members. Additional funds will probably be available to fund additional "green" features.

9. The sum of the 34 planned three year planned pledges ranged from \$303,500 to \$436,000. Three high pledges were mentioned (\$100,000, \$54,000, and \$25,000). A total of ten (26%) households indicated that they would make a pledge of \$10,000 or more. The median pledge was between \$3,000 and \$5,000.

This is a strong level of offered financial support from interviewed members even though they are more involved in the congregation. However, your goal will only be achievable if ALL members are equally informed and energized by the value of this additional space

10. About two in five interviewed households are considering giving stock or other appreciated assets.

I recommend the congregation swiftly put in place policies and procedures to allow your members to do this.

11. Three large gifts are planned to be given early. So, the responses for these 34 pledges indicate 73% of their gifts will be given by the end of 2011. The rest of your members gifts will on the average be smaller and more likely spread over the three years.

I therefore project two thirds (65%) could be received by year end 2011, 20% in 2012, and 15% in 2013.

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12. 58% of those interviewed offered to contribute their time and skills for the finishing of the new space.

This provides a credible strategy for reducing the cost of the new spaces, and or doing additional work to resolve the social space issue.

OTHER FINDINGS

1. Those mentioned to specifically thank for their efforts so far are:

John Schmidt, Ron & Sue Smith, Lois Durran, Andy Lau, Mark Hayes, Jean Wiant, Nancy Davis, Helen Volz, Rocky Landers, Andy Richards, Wayne Osgood, Darlene Weener, Laura Brown, Art Goldschmidt, Peg Dobrinska, Arian Zarkower, Re-organizing Committee, All involved.

2. For a growing congregation it is important to know why existing members joined. Current UUFCC Members were attracted to the congregation for its UU identity and values as well as the welcoming feeling of the community.

- The top mention was being a UU already. (Over 40% of those interviewed previously belonged to another UU congregation, two being lifelong UUs.)
- 37% found the congregation's beliefs and people were a match for them and many found a welcoming and caring community.
- About one in three joined through friends, while one in four found UUFCC while church shopping.
- Only three of the ten families with children specifically noted coming to UUFCC for their children's religious education. Families apparently come to UUFCC looking for something for everyone in the family.
- A few came after attending music and social justice events held at the Fellowship.

3. Over 60% of all interviewees said that they either have the congregation in their wills (29%) or would like more information about how to include the church in their wills (33%). This percentage is high and shows the passion your members have for their fellowship.

Twenty nine households (72%) have wills -- eleven of these already include the fellowship. It is the consultant's suggestion that a wills and planned giving workshop should be offered.

It continues to be a delight to work with you all, especially the Board Members and Stewardship and Finance Teams of the last two years, as well as the current dedicated members of the Building Team.

Submitted by: Frankie Price Stern, UUA Congregational Stewardship Consultant

cc: Wayne Clark, UUA Director of Congregational Fundraising Services

APPENDIX

APPENDIX I – The interview process and selection of interviewees

APPENDIX II – Responses summary

APPENDIX III – Financial projection method

APPENDIX IV – Detail responses tables

APPENDIX V – Interview questionnaire

APPENDIX I -- THE INTERVIEW PROCESS

From September 18 through September 23, 2009 the consultant conducted thirty-nine interviews.

A standard set of questions with some custom additions was drafted by the consultant. These questions were reviewed by members of the Board and the same questions were used for all interviews. 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 worked with Fellowship leaders to carefully identify a representative 25% cross section of the congregation's households. These households included more involved members thereby predicting where all others might be by the time of asking for pledges in the fall of 2010.

Selections were made from involved members in the congregation based on three criteria:

- Wisdom: Those who are listened to by other members
- Wealth: Those that are capable of making significant gifts
- Work: Those that volunteer to be church leaders or to take on significant volunteer tasks within the congregation

The following criteria were considered to ensure a balanced sample:

- Length of membership
- Age
- Level of involvement in congregation
- Have/have not children of RE age
- Involvement in leadership, child/youth RE, social action and music activities
- Level of annual pledge (consultant only information)

The consultant introduced herself at the start of each interview as a UUA Congregational Stewardship Consultant retained by the congregation to assess the financial feasibility of the proposed First Stage of the Master Building Plan.

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

APPENDIX II – RESPONSES SUMMARY

Interviews: 39 Households

of Interviewees: 54 Adults

Gender: Male 35% Female 65%

Age:

Under 30	30-40	41-50	51-65	66-75	Over 75
0%	9%	15%	44%	26%	6%

Year first associated with UUFCC:

Oldest	Latest	Mean	Median
1963	2009	1992	1998

How often attend Sunday?:

Most every Sunday	2-3 Times per month	Once a month	Less
62%	33%	6%	0%

Currently on the Board or on a committee: Yes: 66% No: 34%

If No -- previously served on the Board or as committee chair?: Yes: 19% No: 15%

Households with children enrolled in the children’s religious education program?: Yes: 26% No: 74%

Households with members Involved in the children’s religious education program?: Yes: 33% No: 67%

Involved in planning or regularly attend the Lifelong Learning program?: Yes: 50% No: 50%

Annual household income:
(Shared by 30 out of 39 households)

<\$25K	\$25-49K	\$50-74K	\$75-99K	\$100-149K
10%	20%	33%	23%	13%

What first attracted you to UUFCC?	UU already	Match for me	Friend/family	Church Shopping	Welcoming/Caring	Children	Events
# Responses	22	20	17	14	8	7	4
%	41%	37%	31%	26%	15%	13%	8%

Have you been a member of another UU Cong.?

Yes	No
43%	57%

How long in total have you been a UU?

Longest	Shortest	Average	Median
60	3	24	19

What UUFCC activities are currently of most interest or importance to you?	Community Building & Social activities	Children Youth's RE	Sunday Services	Social Action	Operations (Board, Committees, etc.)	Adult RE	Music
# Responses	29	20	19	16	16	14	14
%	54%	37%	35%	30%	30%	26%	26%

How knowledgeable are you about the MASTER BUILDING PLAN?

Very Familiar	Familiar	Aware of it	Unfamiliar
33%	52%	13%	2%

How knowledgeable are you about the PROPOSED FIRST STAGE OF THE MASTER BUILDING PROGRAM?

Very Familiar	Familiar	Aware of it	Unfamiliar
24%	44%	15%	17%

What is the best feature of the First Stage of the Master Building Program?	Classroom/RE space	Activity space	Storage	Larger rooms	Expansion/expandable	Like design	Courtyard	Sunday AM timing	New Staff Offices	Rental spaces	SC Community Space	Match existing design
# Responses	30	15	14	14	9	7	7	6	4	3	2	2
%	55%	28%	26%	26%	17%	13%	13%	11%	7%	6%	4%	4%

What in the first stage of the Master Building Program seems less important to you?	Courtyard?	Need all space?	Green Features?
# Responses	5	3	2
	10%	6%	4%

What if anything is missing from the first stage of the Master Building Program? 1 -- Very Concerned 2 – Concerned 3 – Not Very Concerned 4 – I'd like to see in 2 nd stage	Connected space	Large room	Classroom doors	Financial plan	Other	Green	Kitchen	Picnic area	Music Room	Space use inventory	Walkway	Offices	Social room	Special room	Larger sanctuary
	# Responses	3	7	4	2	5	9	3	1	1	1	5	5	23	1
Average Level of Concern	1.0	1.4	1.5	1.5	1.8	2.0	2.0	2.0	2.0	2.0	2.4	2.6	3.0	3.0	3.4

On a scale from 1 (lowest) to 10 (highest) in relationship to all the other activities at UUFCC what priority do you assign to the first stage of the Master Building Program?

	1	2	3	4	5	6	7	8	9	10
Responses	1	1	2	2	4	5	11	9	9	10
Percent	2%	2%	4%	4%	7%	9%	20%	17%	17%	19%

(ASKED ONLY if an Priority answer is 7 or lower) What ranks higher in your mind?	Not like plan	Not green enough?	Finances	Space needed?	All activities	Social Action	Other
# (Multiple) Responses	3	3	8	10	14	3	2
Priority Average (Mean) of Responses	3.3	3.3	4.9	4.9	5.8	7.0	7.0

Willingness to increase your annual budget gift level to support additional space costs and a mortgage. The suggested financing would require an increase of 15% in average annual budget giving.

0%	1-14%	15%	Over 15%	No Response	Average (Mean)
15%	15%	36%	10%	23%	11%

Level of financial support for the First Stage of the Master Building Program.

Based on: Members & friends of UUFCC being asked to make pledges in the fall of next year. Donors being given three years to fulfill their commitment.

\$100,000 or above	1	\$7,500 to \$9,999	0
\$50,000 to \$99,999	1	\$5,000 to \$ 7,499	6
\$30,000 to \$49,999	0	\$3,000 to \$ 4,999	2
\$20,000 to \$29,999	1	\$1,500 to \$ 2,999	9
\$15,000 to \$19,999	2	\$1,000 to \$ 1,499	3
\$10,000 to \$14,999	5	Up to \$1,000	3
At this time I do not see myself making a pledge	4*	Not sure/no answer	1*

(Asked only if not planning a pledge) Will you share with me the reason for your answer?*

Doesn't like plan	
Bad financial decision for UUFCC Not sure is where growth will come from	
Personal situation	

If the economy recovers well through the beginning of next year and could your pledge be higher in the fall of 2010?

Yes: 11 (28%) No: 28

Overall possible percentage increase from "Yes" Interviewees: 5%

Is there ANYTHING that would inspire you to make your gift larger?

Improved personal situation	Having more "Greenness"	Include parts of Stage 2	Congregation's wide support
6	4	2	1

Planning to use stocks, bonds, mutual funds or other appreciated assets to pay all or part of this pledge

Yes: 38% No: 62%

Estimate of percentage of gift to be made in each calendar period

	2010	1H2011	2H2011	1H2012	2H2012	1H2013	2H2013
Raw %	40%	8%	15%	8%	13%	8%	7%
Weighted by \$s	56%	7%	10%	7%	10%	6%	5%

The building program \$s will stretch further if members of the congregation contributed “sweat equity” for the finishing jobs. Members who are willing/able to contribute their time and effort to finishing the spaces

Excited to do it	I can help some	Not something I can do
30%	48%	22%

Specific skills offered:

Painting	Generally handy	Carpentry, trim	Organizing, Child care, Support	Flooring	Dry wall	Enthusiasm	Landscaping
11	7	5	5	3	2	2	1

QUESTIONS CONCERNING ENDOWMENT GIFTS:

Have a will?

Yes	No
74%	26%

Included UUFCC in estate planning?

Yes	No
38%	62%

Would like information on how include Fellowship in will:

Yes	No
46%	54%

APPENDIX III -- FINANCIAL PROJECTION METHOD.

Since the sample interviewed was about one in four of UUFCC's member households and the sample was carefully selected, the consultant chose to do a simple projection from current annual budget pledges.

This methodology divides the respondents by the quartiles of the total amount of current annual budget pledges. (Each quartile represents 25% of the current pledges starting from the largest pledges). Most of those in the first (top) quartile (those giving annually over \$3500) were interviewed. For more accurate results the larger fourth quartile (those giving \$1200 and below) was split into two groups at the \$600 giving level. For all groups, the ratio of the interviewee's total planned pledges, including zero responses, to the total of their current annual budget pledges was used to project all those in the group.

These total projections were then checked for credibility by membership date and by the coding of all members' activity levels. The checks by membership date and activity levels did not indicate any concerns. Those involved in the children's religious education program did show a significantly higher projection. This verifies the value of widening the understanding of the multiple uses of the additional space.

APPENDIX IV – DETAIL RESPONSE TABLES.

What first attracted you to UUFCC?	UU already	Match for me	Friend/ family	Church Shopping	Welcoming/ Caring	Children	Events
# Responses	22	20	17	14	8	7	4
%	41%	37%	31%	26%	15%	13%	8%
Already UU	14						
Involved in UU student group in college	x						
Raised UU – mother wanted to attend UU church. Have friends already members. Children asking questions -- RE program. Renewed interest in Adult Learning.	x	x	x			x	
Already attended UU congregation. Looking for community of liberals	x	x					
Sister a UU -- Daughter married by UU minister -- looking for meaning in my life -- felt welcomed -- knew people in congregation	x		x	x	x		
Already attended a UU Congregation -- found fellowship in phone book. Wanted CRE for son	x			x		x	
College roommate grew up UU. Went to local congregation. Moved here -- needed to find a church. Hospitality team got me involved	x			x	x		
Lifelong UU. Looking for community while in grad school	x				x		
Lifelong UU. Brought child to RE. Partner not involved	x					x	
Freedom to pursue thoughts – really		x					
Interesting minister		x					
My beliefs are OK here -- Don't have to be quiet		x					
Brother was UU 40 yrs ago. Moved to area for son. Congregation a place to make friends. Social Justice (including Habitat). Found liberal religion		x	x		x		Social Justice
Friends attending congregation said "you are one of us"		x	x				
Invited by partner. People, values, Mark's messages attracted him. Knew members of f congregation		x	x				
Moved to area. Looking for a congregation. Knew a friend here. Liked philosophy		x	x	x			
Need to change churches. Knew right away it was a different congregation		x		x			
Looking for something different (Belief.net said Unitarian)		x		x			

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What first attracted you to UUFCC? (Continued)	UU already	Match for me	Friend/ family	Church Shopping	Welcoming/ Caring	Children	Events
Wasn't large Christian congregation		x		x			
Moved to area. Looking for a non denominational congregation.		x		x			
Tired of current church (GLBT issue): PBS series -- women and spirituality got me interested in other religions		x		x			
Adopting children -- looking for liberal congregation (2)		x		x		X	
Supportive caring folks here. Theologically where I am		x			x		
Church shopping -- for children. Liberal religion -- no dictates		x				X	
Knew UU Fellowship in previous location. Wanted RE for kids		x				X	
Attended concert and became interested. Came back and what people were saying matched what I believed		x					Music Concert
Came with partner			x				
Came with partner 1 year later			x				
Came with partner 2 years later			x				
Followed partner -- wanted something else -- found friend already here			x				
Friend brought me.			x				
Friends were members (2)			x				
Wanted something to do Sunday morning. Knew a lot of people here			x	x			
Wanted something to do Sunday morning. Knew a lot of people here			x	x			
Very welcoming; tried it again -- found some of my friends already here			x		x		
Not been to a church. Attended events -- found I knew those who attended here			x				Music Concert
Had to find liberal community. Met Newham's right away -- invited for coffee				x	x		
Ed Budd was a member. Greeted everyone					x		
Music program							Music

What UUFCC activities are currently of most interest or importance to you?	Age Range		Community	Children's RE	Sunday Services	Social Action	Operations	Adult RE	Music
	# Responses		29	20	19	16	16	14	14
	%		54%	37%	35%	30%	30%	26%	26%
Soulful Sundown, Music (choir), Children's RE	30-40		x	x					x
RE program, Sunday services (was in YA/student groups)	30-40		x	x					
Book discussions, Social events -- support and networking, Big life topics discussions, YRUU advisor	41-50		x	X				x	
RE program, Sunday services (was in YA/student groups)	41-50		x	X					
Band, Social functions, Children's RE, Building care	51-65		x	X			x		x
Music, field trips (e.g. Falling Water), retreats, playground	51-65		x	X				x	x
Currently Social functions -- was RE	51-65		x	X					b
Sunday services, teaching owl, growth of young people, special relationships, Caring committee	66-75		x	X	x				
Children (38 yrs teaching), Social activities, Fundraising events	66-75		x	X			x		
Social activities (TGIF, Soulful Weds.)	41-50		x		x				
Mark's services, Membership, Diversity	51-65		x		x	x			
Mark's services, Community & fellowship, Welcoming -- hospitality team, Technology	51-65		x		x		x		
Meditation, Vespers, Sunday services, Singing hymns, Instant community -- extended family	51-65		x		x			x	x
Sunday sermons, Great summer lay services, Quality of members -- interesting values, Learn a lot, Music	51-65		x		x			x	x
Sunday Services, Wonderful Wednesdays (2)	66-75		x		x				
Sunday sermons, Music, Come to meet friends	Over 75		x		x				x
Endowment Committee, Church Auction (7x), Finance Committee	41-50		x			x	x	x	
Hospitality team -- want be more involved in small groups, choir, games nights	41-50		x			x		x	
All activities, Small Group ministry, Caring committee	66-75		x			x	x		x
Choir, Board, Hospitality team, Taskforce for health care reform	66-75		x			x	x		
Liberal community, Music	66-75		x			x			
Adult RE, Meditation, Wonderful Wednesdays, TGIF	66-75		x				x		
Community, Social action	66-75		x				x		

What UUFCC activities are currently of most interest or importance to you? (Continued)	Age Range		Community	Children's RE	Sunday Services	Social Action	Operations	Adult RE	Music
Believer,/Agnostic/Atheist Group Leader, TGIF	Over 75		x				x	x	
Social activities, leadership, provide space for growth	41-50		x						x
Social action committee, Small group ministry, IT & Finance committee, Soulful Wednesdays, Game night, Meditation group, Fair trade coffee	51-65		x					x	
Social action initiatives, Lay leadership, Hospitality	51-65		x					x	
Social action, Opportunities for learning, Social network	51-65		x					x	x
Youth Group, Owl Teacher	30-40			x					
Children's RE (2)	30-40			x					
Book for every child, Membership committee, Teach RE	41-50			x		x	x		
Children's RE, OWL teacher	41-50			x					
Services, RE committee, teach RE, Social events	51-65			x	x	x			
Sunday services, Finances & church business, Planning & Board, Owl trainer	51-65			x	x		x		
Social Justice, Children's RE, Both -- otherwise would not be here	51-65			x		x			
Children's RE	51-65			x					
RE Committee, Montessori education	51-65			x					
Children's RE	66-75			x					
Social Action, Sunday services	51-65				x	x			
Sunday services, community meetings, adult learning	51-65				x	x		x	
Sunday Services (am+pm), Music	51-65				x		x		x
Sunday Services, Meditation Group, landscaping	51-65				x		x	x	
Sunday Services (am+pm)	51-65				x				x
Non denominational spiritual experience	51-65				x				
Board, Sunday services, Music Adult RE	66-75				x		x	x	x
Adult RE, Leadership for 10 years, Sunday services	Over 75				x		x	x	
Social action, Membership Committee	51-65					x	x		
Social Action -- Centre County Democrats outreach (2)	51-65					x			
Music, UUSC (2)	66-75					x			x
Health care reform	66-75					x			
Music	66-75								x

What is the best feature of the First Stage of the Master Building Program?	Classroom/RE space	Activity space	Storage	Larger rooms	Expansion/expandable	Like design	Courtyard	Sunday AM timing	Offices	Rental spaces	SC Community Space	Match design	Other
# Responses	30	15	14	14	9	7	7	6	4	3	2	2	
%	55%	28%	26%	26%	17%	13%	13%	11%	7%	6%	4%	4%	9%
More space for RE, Larger rooms, More rental space, More outreach/community space, More storage	x	x	x	x						x			
More space for lifelong learning, Storage for seasonal items, Additional coat hanging	x	x	x										x
Classroom sizes, flexibility, Space crunch in RE, Space for other activities, Office space	x	x		x					x				
More space for RE and other activities, Larger rooms, More child friendly, More space for display, More storage	x	x		x									x
More room for children, solve timing issues	x	x						x					
More classrooms/activity space/options	x	x											x
More space for RE, Space for all activities	x	x											
More space, Like design, Larger rooms, More easily accessible storage	x		x	x		x							
Really needed, Larger teaching spaces, Storage in rooms, More office space,	x		x	x					x				
Larger rooms, More space, storage	x		x	x									
Larger rooms, More space, storage	x		x	x									
Size of classrooms, Basement (storage)	x		x	x									
Basement storage, Like courtyard, Fits land, Classroom space, Good bathrooms, Good step	x		x		x	x	x						x
Additional RE rooms, Storage, Growth	x		x		x								
Additional RE rooms, Storage, Growth	x		x		x								
More storage space, Extra classroom space	x		x										
More and bigger classroom spaces, More storage (bigger need)	x			x			x						
More/bigger classrooms (2)	x			x									

What is the best feature of the First Stage of the Master Building Program? (Continued)	Classroom/RE space	Activity space	Storage	Larger rooms	Expansion/expandable	Like design	Courtyard	Sunday AM timing	Offices	Rental spaces	SC Community Space	Match design	Other
Well thought out plan, Gives space for what we need, design especially like courtyard	X					x	x						
Add needed space, done in non-disruptive design (2)	X					x							
Different RE spaces, Courtyard	X						x						
Extra classrooms, Time flexibility (2)	X							x					
More classrooms and offices	X								x				
Expand # of rooms for RE, Keep from losing kids due to overcrowded rooms	X												x
More classrooms (2)	X												
More classroom space (lifelong learning)	X												
More space period	X												
Additional classroom and meeting space, additional storage (2)		x	x										
Need more room for programs & storage		x	x										
More flexible space, Rental space, Raise moral/enriching community -- variety and fun		x		x						x			x
More flexible space, Rental space		x		x						x			
Meeting spaces after services, solve timing issues, accommodate growing #s		x			x			x					
Meetings after service (not all day church), Enough meeting rooms (2)		x						x					
More space, Activities space, Exposure to SC community		x									x	x	
Better size classrooms, Storage in basement			x	x									
More activity/flexible space			x										
More & larger classrooms, Community space resource, Free timing to have all kids together, Maintain architectural integrity, be a welcoming community				x				x			x	x	
Larger classroom spaces				x									
Courtyard, staged plan layout					x		x						
Able to be added to later, matches design of existing building					x							x	
Allow congregation to grow					x								
Great option, Like open courtyard						x	x						
Great option, Like open courtyard						x	x						

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What in the first stage of the Master Building Program seems less important to you?	Courtyard?	Need all space?	Green Features?	Other
# Responses	5	3	2	
Courtyard	2			
Courtyard (Flaw -- see no use, difficult to maintain)	x			
Not sure courtyard is useful	x			
What is use/maintenance of courtyard	x			
Could cut back on space and still have enough		x		
Need all classrooms?		2		
Not sure separate heating system is good idea			x	
Geothermal proposal -- spending a lot on green?			x	
No fireplace in stage 2				x
Try not to lose too many classrooms				x

What if anything is missing from the first stage of the Master Building Program?

How concerned are you that it is missing from the first stage of the Master Building

1 -- Very Concerned 2 – Concerned 3 – Not Very Concerned 4 – I'd like to see in 2nd stage

What if anything is missing from the first stage of the Master Building Program?	Connected space	Large room	Classroom doors	Financial plan	Other	Green	Kitchen	Picnic area	Music Room	Space use inventory	Walkway	Offices	Social room	Special room	Larger sanctuary
# Responses	3	7	4	2	5	9	3	1	1	1	5	5	23	1	5
Average Level of Concern	1.0	1.4	1.5	1.5	1.8	2.0	2.0	2.0	2.0	2.0	2.4	2.6	3.0	3.0	3.4
Connect building to main building	1														
Get rid of courtyard -- brings dirt into buildings -- connect buildings -- energy, inconvenience, maintenance expense	1														
Non-connection of spaces isolates Sunday morning activities -- especially generations -- isolates RE program from congregation	1														
Large meeting room for education meetings (with good media)		1													
Large room for groups (20-30) & for band		1													
Large space for all kids worship or performances		1													

What if anything is missing from the first stage of the Master Building Program? (Continued)	Connected space	Large room	Classroom doors	Financial plan	Other	Green	Kitchen	Picnic area	Music Room	Space use inventory	Walkway	Offices	Social room	Special room	Larger sanctuary	
Large space -- flexible wall		1														
One large room		1														
Large room for large groups (20-30) & for band		2														
Large room		3														
Need outside doors in classrooms (2)			1													
Outside doors for all classrooms			2													
Outside exits from each classroom			2													
Need to know full financial cost				1												
Financial plan needed				2												
Universal access -- grab bars in restrooms, wheelchair size doorways					1											
Want loss of classroom only at time of new space availability (Done in Summer?)					1											
Lights on signage					2											
Sound system available?					2											
Brighter entry					3											
Bold green statement (solar or green)						1										
Room by room thermostats						1										
True greenness -- too much sprawl, use usable roof space, Build less						1										
Windmill						1										
Greenness -- windmill (capital campaign logo)						2										
Plan for artificial roof shakes -- low maintenance (carpenter beetles)						2										
Plan for artificial roof shakes -- low maintenance (carpenter beetles)						3										
Room by room vent controls						3										

What if anything is missing from the first stage of the Master Building Program? (Continued)	Connected space	Large room	Classroom doors	Financial plan	Other	Green	Kitchen	Picnic area	Music Room	Space use inventory	Walkway	Offices	Social room	Special room	Larger sanctuary
Green house (size of room 6) -- growing plants during colder months						4									
Windows in future kitchen							1								
Commercial kitchen (raising funds, community exposure)							2								
Need Small kitchen in new wing (basics in future kitchen area?)							3								
Picnic pavilion accessible to Courtyard								2							
Music Director's office/music library & storage for larger instruments included?									2			2			
How will rooms be used on Sunday?										2					
Heated walkways											1				
Enclosed (glass?) walkways											2				
Heated walkways											3				
Wind blows into courtyard -- walkway cold -- building not really connected (2)											3				
Where are the offices?												2			
Minister's office and more staff offices												3			
Office for Music Director												3			
Re-arrange staff offices												3			
Need re-assessment -- Priority should be social gathering space													1		
Social space (2)													1		
Concerned that those with resources will want social space first													2		
Larger social room not included													2		
Social space													2		
Social space solution -- meeting and RE space does have priority													2		
Social space solution -- meeting and RE space does have priority													2		

What if anything is missing from the first stage of the Master Building Program? (Continued)	Connected space	Large room	Classroom doors	Financial plan	Other	Green	Kitchen	Picnic area	Music Room	Space use inventory	Walkway	Offices	Social room	Special room	Larger sanctuary
Will social space get done?													2		
Evaluation/Larger sanctuary needed?													2		2
Expand social room													3		
Bigger social room & sanctuary													4		4
Does not deal with larger sanctuary and social space -- priority is right													4		4
Doesn't address social space													4		
Social Hall space													4		
Social room													4		
Social Room, Library, Kitchen, Larger commons													4		
Social Room, Library, Kitchen, Larger commons													4		
Social space (3)													4		
Stage 2 is missing (2)													4		
Quiet room -- meditation room														3	
Do we have adequate sanctuary space?															3
Size of sanctuary															4

On a scale from 1 (lowest) to 10 (highest) in relationship to all the other activities at UUFCC what priority do you assign to the first stage of the Master Building Program?

	1	2	3	4	5	6	7	8	9	10
Responses	2	1	2	2	4	5	11	9	9	10
Percent	4%	2%	4%	4%	7%	9%	20%	17%	17%	19%

(ASKED ONLY if Priority is 7 or lower) What ranks higher in your mind?	BLDG PROJECT PRIORITY	Not like plan	Not green enough?	Finances	Space needed?	All activities	Social Action	Other
# Responses	39	3	3	8	10	14	3	2
Priority Average (Mean) of Responses		3.3	3.3	4.9	4.9	5.8	7.0	7.0
Pastoral program, re-assessment plan involving where our growth will come from and space needed, larger footprint not green, assess maintenance needed for new space, separate space inconvenient	1	1	1	1	1	1		
Operating budget growing but not membership	1			1				
Not sure it is needed -- why change?	2	2	2		2			
Concerned about impact on finances	3			3				
Most activities	3					3		
Do we need the space at our current size, Lots of elderly dynamic leadership >60 -- establishing solid core of energetic members who can contribute/fund to run fellowship at its current size,	4				4	4		
Space does not seem to be an issue, like playground/sandbox	4				4			
Programming -- more programs, small group support (e.g. grief group), Live alone telephone network, What about long range plan -- room in sanctuary	5				5	5		
Concerned we might have to give something up	5					5		
Financial situation – economy	5			5				
Not sure it is needed, Why change?	5				5			
On going cost of space support -- need sexton? How community gets together -- maintaining values	6			6		6		
Unsure of economy -- Is this the right time?	6			6				
Not sure it is needed, Why change?	6				6			
Maintaining good function and programming	6					6		
Maintaining level of interest in on-going activities, could reduce energy for activities	6					6		
Extra \$s for courtyard, What is current attendance -- how much space do we really need (classrooms & storage, Concerned about counting on growth to fund -- not sure we are	7			7	7			
Sunday services	7					7		
All activities	7					7		
Do we have strong enthusiasm in congregation for our children and the future of the denomination	7					7		
Full financial feasibility review	7					7		
Is congregation growing?	7				7			
Daily stuff -- Social Justice especially health care reform	7						7	

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<i>(ASKED ONLY if Priority is 7 or lower)</i> What ranks higher in your mind? (Continued)	BLDG PROJECT PRIORITY	Not like plan	Not green enough?	Finances	Space needed?	All activities	Social Action	Other
Increasing Social Action	7						7	
We have been down this road before and nothing happened	7							7
Glad we are going to do it. Membership aging -- need more new members	7							7
Normal activities	7					7		

APPENDIX V – THE QUESTIONNAIRE

I am Frankie Price Stern, the UUA Congregational Stewardship Consultant who has been working with your leadership on your proposed first stage of your Fellowship's Master Building Program. You are part of a representative sample of the congregation that I am interviewing to determine if UUFCC is ready to go ahead with the campaign to raise the funds. Your answers to my questions will enable me to make recommendations to the congregation. I am using the same set of questions for every interview. Your answers are completely confidential except where noted. I will be using this information in summary to compile my report.

MEMBERSHIP:

1. Gender: A: Initials ____ Male ____ Female ____ B: Initials ____ Male ____ Female ____

2. What year were you first associated with UUFCC? Year A: ____ B: ____

3. What first attracted you to UUFCC?

Answer A:

Answer B:

4. Have you been a member of another UU Cong.? A: Yes __ No __ B: Yes __ No __

If yes, how long in total have you been a UU? Years A: ____ B: ____

5. What UUFCC activities are currently of most interest or importance to you?

Answer? A:

Answer? B:

The following questions are about the BUILDING PROGRAM

6. How knowledgeable are you about the FULL Master Building Plan?

A: Very familiar ____ Familiar ____ Aware of it ____ Unfamiliar ____

B: Very familiar ____ Familiar ____ Aware of it ____ Unfamiliar ____

7. How knowledgeable are you about the proposed first stage OF THE MASTER BUILDING PROGRAM?

A: Very familiar ____ Familiar ____ Aware of it ____ Unfamiliar ____

B: Very familiar ____ Familiar ____ Aware of it ____ Unfamiliar ____

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(If more than one person is being interviewed for the rest of the questionnaire place initials or A/B identifier with each response.)

I am going to go through the DETAILS OF THE FIRST STAGE OF THE MASTER BUILDING PROGRAM to ensure all interviewees equally understand the basics of the plan as they answer the following questions. (Explain First stage of the Master Building Program plan outline)

**8. What is the best feature of the first stage of the Master Building Program?
Answer?:**

**9. What in the first stage of the Master Building Program seems less important to you?
Answer?:**

**10. What if anything is missing from the first stage of the Master Building Program ?
Answer?:**

11. How concerned are you that this is missing from the first stage of the Master Building Program?

**A: Very concerned___ Concerned___ Not a big concern___
I'd like to see it in the next stage___**

**A: Very concerned___ Concerned___ Not a big concern___
I'd like to see it in the next stage___**

12. On a scale from 10 (highest) to 1 (lowest) in relationship to all the other activities at UUFCC what priority do you assign to the first stage of the Master Building Program?

A: 10 ___ 9 ___ 8 ___ 7 ___ 6 ___ 5 ___ 4 ___ 3 ___ 2 ___ 1 ___

B: 10 ___ 9 ___ 8 ___ 7 ___ 6 ___ 5 ___ 4 ___ 3 ___ 2 ___ 1 ___

**13. (ASK ONLY if an answer is 7 or lower) What ranks higher in your mind?
Answer?:**

FINANCES AND EXPECTED GIFT

I am going to ask a series of questions about finances and the gift you are considering; your answers will enable me to estimate UUFCC’s capacity to finance the proposed building plan. Please answer as well as you can. As I said before all answers are confidential.

14. Before I ask you about a possible Capital Campaign gift, I would like to ask you about your willingness to increase your annual budget gift level to support a mortgage. The suggested financing would require an increase of 15% in average annual budget giving.

By what percentage might you be willing to increase your annual budget pledge?
_____ %

15. Currently about 170 households annually provide financial support for UUFCC. How many of those households do you think could make a major gift to the first stage of the Master Building Program in addition to their annual budget gift? (A major gift is \$10,000 or more paid over 3 yrs) Answer _____

16. Please take a few moments to consider your level of support for the first stage of the Master Building Program.

I am going to ask you to indicate the range in which your gift might be found. This is NOT a pledge. Rather your response will help in planning for an achievable goal.

Based on the current schedule members and friends of UUFCC will be asked to make pledges in the fall of next year.

Please keep in mind that when you make your pledge, you will have up to three years to fulfill your commitment. This pledge will be in addition to your annual pledge support. It is important for the health of UUFCC that your annual pledge not be reduced to make your commitment to this project.

PLEASE GIVE THE LETTER OF THE RANGE THAT MATCHES THE 3 YEAR PLEDGE YOU ARE CURRENTLY CONSIDERING

- | | |
|---|------------------------------|
| _____ A) \$100,000 or above | _____ G) \$7,500 to \$9,999 |
| _____ B) \$50,000 to \$99,999 | _____ H) \$5,000 to \$ 7,499 |
| _____ C) \$30,000 to \$49,999 | _____ I) \$3,000 to \$ 4,999 |
| _____ D) \$20,000 to \$29,999 | _____ J) \$1,500 to \$ 2,999 |
| _____ E) \$15,000 to \$19,999 | _____ K) \$1,000 to \$ 1,499 |
| H _____ F) \$10,000 to \$14,999 | _____ L) Up to \$1,000 |
| _____ M) At this time I do not see myself making
a monetary pledge to the capital campaign | |
| _____ N) Not sure/no answer | |

17. (ASK ONLY if (M) or (N) is checked) Will you share with me the reason for your answer?

18. (SKIP if (M) or (N) is checked) if you are comfortable, can you give the amount you are thinking of? \$ _____

19. If the economy recovers well through the beginning of next year and could your pledge be higher in the fall of 2010? Yes ___ No ___ If so by what percentage? ___%

20. Is there ANYTHING that would inspire you to make your gift larger?
Answer?:

21. (ASK ONLY if a major gift (\$10,000+) is planned) Since you are planning a major gift, may I share your name and the level of your gift with the Major Gifts chair? Yes ___ No ___

22. Are you planning to use stocks, bonds, mutual funds or other appreciated assets to pay all or part of this pledge? Yes ___ No ___

23. Can you estimate what percentage of your gift will be made in each of these calendar periods?

2010 ___% 1H2011 ___% 2H2011 ___% 1H2012 ___% 2H2012 ___%

1H2013 ___% 2H2013 ___%

24. Is there anyone outside the current membership of UUFCC who should be approached for a contribution to the first stage of the Master Building Program?

25. Lastly, the building program \$s will stretch further if members of the congregation contributed "sweat equity" for the finishing jobs. How willing/able are you to contribute your own time and effort to finishing the spaces?

Answer?: Excited to do it ___ I can help some ___ Not something I can do ___

26. Do you have any specific skills to offer?

For the last set of questions in this FINANCES section, I want to ask you about your estate planning as a part of the long-term financial health of UUFCC.

27. Do you have a will? Yes ___ No ___

28. Have you included UUFCC in your estate planning? Yes ___ No ___

29. Would you like more information on how to do that? Yes ___ No ___

OTHER ISSUES

30. I there anyone you would like to specifically thank who has been involved in the recent planning process, the development of first stage of the Master Building Program or in other areas of UUFCC?

Answer?:

31. What role MIGHT you be willing to take on to support raising funds for the first stage of the Master Building Program?

- a. Be part of the leadership team for the campaign?
- b. Attend an orientation session to find out about being a steward? (Stewards meet with another member to receive their pledge to the capital campaign on behalf of the Congregation.)
- c. Help with phone calls to follow up on pledges not yet received?
- d. Support in other ways?

The following DEMOGRAPHIC questions will provide helpful information for the final report. Again, your responses are confidential.

32. How often do you attend Sunday Services?

Most every Sunday 2-3 a month Once a month Less

33. Do you currently serve on the Board or on a committee of UUFCC? Yes No

34. (ASK ONLY if the answer to 33 is NO) Have you previously served on the Board or as a committee chair of UUFCC? Yes No

35. Do you have children enrolled in the children's religious education program?

Yes No

36. (if NO) Are you involved in the children's religious education program?

Yes No

37. Are you involved in planning or do you regularly attend the Lifelong Learning program?

Yes No

38. What is your age?

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

39. If you are willing to share, what is your annual household income including moneys received from investments?

Under \$25,000 \$25,000-\$49,000 \$50,000-\$74,999
\$75,000-\$99,999 \$100,000-\$149,000 \$150,000-\$249,999
\$250,000-\$499,999 \$500,000+

THANK YOU so much for your time. The summary results of this study will be reported to the Board and other leaders and presented at the congregational meeting on November 15