

Assessment Visit – October 2010
Williamsburg Unitarian Universalists

Summary Data

Name of Congregation: Williamsburg Unitarian Universalists

Minister: The Rev. Jennifer Ryu

Contact Persons: Rev. Ryu, Christine Faia, President

Number of Members (current): 270

Contributing Households (FY11): 190

Annual Budget (FY11): \$370,000

Annual Income from financial commitments (pledges): \$301,725

Average (mean) Commitment: \$1588

Median Pledge: \$1000

Approximate average Sunday attendance: 153 adults; 25 children & youth

Debt: Approximately \$188,000 in two mortgages: one with SunTrust (\$134,000), the other with the UUA (\$54,000). Debt service for the current fiscal year is estimated at \$39,243, or 10.6% of the total budget.

Endowment/Restricted Funds: Approximately \$56,000 in general endowment funds, held in UUA Common Endowment Fund. Temporary restricted funds total almost \$94,000; permanent restricted funds of \$38,000 include more than \$25,000 in the “Next Step” Fund, designed to be used to cover start-up costs associated with capital projects (such as this assessment visit).

Does the congregation conduct a face-to-face annual Stewardship drive? Most recently, WUU has successfully employed “cottage meeting” gatherings to promote the annual budget drive. Earlier years have seen one-on-one conversations, letters, and phone calls.

Date and Purpose of last Capital Campaign: The most significant capital fundraising effort in WUU’s history was the original campaign to construct the current church building in 1993-1994, known as “Home ‘95.” This was the culmination of a series of bold, faithful steps taken by the original group of charter members, and is rightly viewed as a major accomplishment.

Does the congregation have current a Vision and Mission Statement and Long Range Plan? WUU adopted a Covenant statement in 1990 which is still in force; the Mission Statement was developed and approved more recently.

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There is no current Long Range or Strategic Plan in place; however, in 2007 the congregation approved a ten-year Vision statement, along with a set of five-year congregational goals. (see Appendix)

Describe proposed project and estimated costs: Original plans for WUU's facility included a long-range commitment to create adequate and flexible space to accommodate faith development programs for all ages. This issue has become more urgent as the congregation has grown in numbers of adults and children, and as additional growth may have been compromised by limited spaces for programs and fellowship. A congregational retreat in February 2006 identified the need for "better facilities, particularly for Lifespan Faith Development" and recommended involving the congregation in a process "for future expansion."

What steps have been taken to prepare for this project, and to involve the congregation? A Facilities Development Committee was appointed by WUU's Leadership Team in early 2009, partly in response to suggestions about minor changes that might ease crowding in the narthex during coffee hour. This group's charge grew to include several elements: compiling a history of WUU building and expansion efforts, summarizing financial data on the congregation's outstanding loans, considering challenges and "strains" evident in the congregation's current use of its facilities, and recommending a process by which WUU might explore options for a new capital campaign.

The resulting lengthy report was presented to the WUU Board earlier this year, and distributed to the congregation shortly before the assessment visit. The first significant congregational discussion of the report and its findings took place during the assessment, especially at the open meeting on Saturday morning.

Did you meet with the minister or other staff? Yes; I spoke with Rev. Ryu on the telephone several times before arriving, and met with her, Margaret Sequeira (Director of Lifespan Faith Development), and Mary Ellen Lloyd (Administrator) at several points during the visit.

What action will be taken? When is a campaign likely to take place? No specific project, plan, or timetable has yet been proposed. Preliminary discussion at the assessment open meeting suggested the possibility of spending a year to develop a consensus on a shared future vision, and then developing a facilities upgrade plan that could support that vision becoming a reality. Concerns were also expressed about the need to pay off at least one of the existing loans before

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taking on more debt. Assuming that such a timetable were to be adopted, a capital campaign might be most likely to happen in 2013 or 2014.

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A note about participants: From my notes, it appears that almost half of those who participated in the small group meetings are somewhat new to the congregation, having arrived within the last ten years. Approximately 34% of participants have been active for 10 - 15 years, and 17% have been members for more than 15 years, including five charter members of WUU. (No information on membership tenure was gathered at the large meeting on Saturday.)

In evaluating the findings of this report, it may be useful to consider how these percentages correspond to the membership as a whole. As discussions about planning and possible future projects move forward, it will be important to intentionally involve members from all of the church's generational cohorts in the conversation.

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- What are the strengths of the congregation?
The congregation is very active in its community involvement. They have a strong sense of mission and purpose. They are committed to social justice and equality. They are open-minded and accepting of all people. They are a tight-knit community that supports each other.
- What are the challenges facing the congregation?
The congregation faces several challenges. One is the aging of the membership, which may lead to a decline in attendance and participation. Another challenge is the lack of financial resources, which may limit their ability to support their programs and missions. They also face challenges related to maintaining their facilities and property.
- What are the opportunities available to the congregation?
The congregation has several opportunities available to them. One is the potential to expand their outreach and engagement with the community. They could explore new partnerships and collaborations with other organizations. Another opportunity is to invest in their facilities and property to ensure they remain viable for years to come. They could also consider exploring new programming or initiatives to engage younger members of the community.

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