



**East Shore Unitarian Church (WA)**  
**Next Steps Weekend Report**  
**May 15-17, 2015**

**I. SUMMARY**

The East Shore Unitarian Church (East Shore) engaged Mark Ewert, Unitarian Universalist stewardship consultant with *Stewardship For Us*, for a Next Steps Weekend. The objective was a holistic assessment of congregational functioning, to inform a future mission/visioning process, and to recommend other possible next steps. The Next Steps Weekend was conducted over the weekend of May 15-17, 2015 (the schedule is in *Appendix A*). Mark presented his initial findings and recommendations to the board and ministers following the worship services on May 17. This report presents the results of the Next Steps process.

**The major findings** are that East Shore has:

- A large and well cared-for grounds and buildings
- A mature and well liked minister, who has launched some challenging initiatives
- A dedicated and passionate lay leader group
- Recent staffing changes
- Well-managed and efficient financial systems
- A governance model that has become unclear, and effectiveness could be improved
- An annual pledge drive that was well run and successful this year
- A gradual decline in membership of the last few years
- The lack of a bold and clearly-articulated vision for the congregation's future
- Some strong and long standing social justice programs
- A vibrant kids religious education program, with efforts to grow intergenerational involvement
- Opportunities to improve welcoming at all levels of congregant engagement
- Some unproven ideas that are generally held in the congregation; myths that may hold a kernel of truth
- Recommendations include:
  - Create a new mission, vision, and strategic plan for the congregation
  - Clarify your governance program and align it with your key documents
  - Make steps to improve your *way-finding* at all levels, and build your membership culture
  - Provide more support for your annual drive and stewardship education year-'round



## II. INTRODUCTION

### Background Data

Name and Mailing Address of Congregation	East Shore Unitarian Church 12700 SE 32nd Street in Bellevue, Washington 98005
Website Address	www.eastshoreunitarian.org
Dates of Visit	May 15-17, 2015
Minister(s)	Rev. Dr. Peter J. Luton
Point of Contact	Jack Slowriver, Board member and Chair, Mission/Vision Team
Number of Members	582
Annual Financial Commitments	\$736,500. 346 donor households
Average & Median Financial Commitment	Average = \$2,128. Median = \$1,200.
Endowment (Permanent Funds)	\$1.2 Mil.
Approach to Annual Budget Drive	Mailings, breakfast, leadership event
Date and Summary of Last Capital Campaign	Building renovation to sanctuary (2010-2012) - \$470K raised. Commitments finished this year

### Presenting Issues

Some presenting issues and challenges:

- Congregation has been changing and needs a new vision for the future
- Gradually declining membership over the last few years
- Staffing changes that have been challenging to congregational functioning

### Advance Contacts

Mark received written materials in advance of the visit through Jack Slowriver. Prior to the visit, Mark also had phone conversations with Rev. Luton; Rebecca Chatfield, Church Administrator; Aisha Hauser, Director of Religious Education; and Janine Larsen, Pacific Northwest District Executive.

### Geographic Context and Brief History Highlights

Bellevue, WA where the congregation is located, is part of the Eastside region, and as Seattle's largest suburb is the second largest city center in Washington State. Bellevue is just South of Redmond, home of Microsoft, Nintendo, and Valve Corp and it has major highway access to Seattle. This makes it a hub for many businesses. The city is working to develop more connections to Redmond through



development and public transportation, which has been approved to link the communities to each other and Seattle.

The racial majority in Bellevue itself, as of the last census, was white, with Asian people the second largest group (28%). There are also Latino and African American populations and a small number of Native Americans and Pacific Islander residents in Bellevue. The congregation draws people from the whole region East of Seattle, so is accessible to a large population with a high rate of racial diversity.

East Shore Unitarian Church was started in 1948 around a religious education program and was officially organized in 1950. The current property was acquired in 1953 and the dedication for the current sanctuary building was in 1955. This included Holly House and its lot, which is now used by a local non-profit to benefit homeless women. Due to increased participation, the first separate wing for religious education was constructed in 1960.

In 1961, East Shore helped found Northlake Unitarian Fellowship in Kirkland. For three years provided financial support for its minister, Ralph Mero, who served East Shore part-time. The Rev. Peter Luton was called in to serve as the minister in 1997, so had a long, stable and successful ministry. In 1999, a capital campaign was run that resulted in the new two-story religious education building.

East Shore became a *Welcoming Congregation* for Gay, Lesbian, Bi-sexual and Transgender people in March of 2001. That same year, there were a number of staffing changes, similar to the current situation. Those included the bookkeeper, membership director, office manager, and youth coordinator. This is remarkable in the congregation's history, as otherwise it holds staff members for longer periods of time and has not had numerous staff transitions at the same time. 2001 was also the initiation year of the partner church relationship in Transylvania.

Around this time, the congregation started housing a group of homeless men for a month, as part of the *Congregations for the Homeless* program. Later, East Shore added facilities to the Religious education building to better accommodate these yearly guests. A shift to policy based governance was started in 2004. After a successful special campaign, the Rev. Joan Montagnes joined the congregation as the Associate Minister in 2005. She served until earlier this year. The partner church relationship with the Khasi Hills of India congregation started in 2007.

In 2012, both Rebecca Chatfield and Aisha Hauser were hired. 2012 was also the year that the congregation started the *Beloved Conversations* program, a curriculum that explores race and diversity through personal stories, and the sanctuary was renovated.

### III. FINDINGS

#### Commendations and Assets

- The buildings and grounds are beautiful and well-cared for. This is the result of a steady and long-term effort as the site is large, has four separate buildings, and needs a lot of upkeep and



maintenance. The lay volunteers and professional have managed this well, and member donors have faithfully funded their upkeep over the years.

- The board has faced some real challenges with staffing, monetary, and other issues during the last couple of years. It is an intelligent group, intent on its duties to the congregation, and with better communication going forward.
- The minister is a mature professional who has helped stabilize the congregation during the last few challenging years. He has also helped launch new and ambitious ministries to grow in the congregation.
- The lay leaders that were part of the process on Saturday are a passionate and engaged group! This is a significant asset to the congregation.
- Your financial systems are well run by skillful leaders and have recently been aligned to make future budgeting less challenging. The congregation has a good mix of rental income, and manages the booking of rooms well, so congregants have priority for their ministry needs.
- Your most recent annual budget (pledge) drive was well-run and successful. It used positive and inspiring messages to inspire giving rather than “pulling the alarm bell.” It also addressed what congregants might need as well as what the congregation needs. This can be seen in the brochure, which was explicitly geared toward congregants who needed basic information.
- The congregation has made a significant effort in multi-culturalism and anti-racism with the *Beloved Conversations* initiative, which has already involved a good number of congregants. This is bold and challenging work.
- The congregation has recently created a dual focus in the Social Justice area, to engage more parts of the congregation. It also has a long-standing effort to house homeless men on the campus for a month each year. This demands substantial resources from the congregation.
- Your Religious Education program seems vibrant and engaging. There is a strong effort to integrate the adult worshipers and the families with young children & youth into a multigenerational community.

### **Challenges**

- The leadership is correct in assessing that the congregation is lacking focus and individual ministries seem to function in a disconnected way from each other. Many of these ministries are vibrant and active, however setting a strong and more unified direction would enable the congregation to embody its values and create more powerful change in the world.
- After a period of challenging decisions, communications, and staffing changes, there is energy to reconsider the congregation’s purposes. This is a positive thing, yet when things are emerging and



not yet formed people can become uncomfortable with the unknown, or overly defensive about their particular church activities or affiliations.

- The governance program of the congregation has become ill-defined, even to the board. The functioning falls somewhere between policy-based governance and an implementation-oriented board, and has lost some of the effectiveness of either system. This seems to have created confusion in the congregation as to authority, responsibility, and reporting. Also, the key documents of the congregation, the Bylaws and Policies, do not seem to match how the board is functioning. This may be causing a lack of confidence in the leadership.

### **Congregational Circles of Engagement**

The chart in Appendix B can be used consider how “welcoming” the congregation is at all levels of engagement. Welcoming is assessed by A) a sincere invitation and B) clear guidance as to the process for all transitions to a deeper level of engagement. For instance to go from Attending to Member there must be a direct and informative invitation to become a member; and generally available, clear guidance for the process. When considering this section, please remember that it does not document the many ways you are effectively welcoming folk at all levels. You have a crowd of passionate and dedicated members who love the congregation; they were all welcomed by you.

### Attracting Visitors

- Outreach and marketing to the East Side could be more intentional. Your website does need refreshing, yet all of the basic information needed by people researching East Shore is there.
- The facility is in a location that is hard to find, not on a well-traveled road, and is screened by thick vegetation. In addition the signage is small and hard to see, even if you are looking for it.
- Once you enter the parking lot, which is hard to map mentally because of its cul-de-sacs, there are no clear traffic directions, no defined parking spots, and no sight of any buildings. This is confusing and hard to navigate.
- Once parked, there are multiple paths and only one has a sign. One wonders if the walk will be long and where one will end up. A posted simple map of the campus in the lower parking lot might be helpful.
- Once near the buildings it is hard to tell what each one is for and where one might find what once came there for. Again a map might be helpful. Similarly once inside buildings, there is not signage to tell one where things are. All of these point might fall under the category of *newcomer way-finding*. Generally this is a site that is hard to navigate for newcomers once they find you.

### Visitor to Attending

- East Shore offers lots of opportunities for people to come to the campus, but you do not seem to be making efforts to invite guests and give guidance for engaging with the congregation. What information in written formats, presentations, or personal conversations is ready and available with East Shore Live, Gallery events, the music school, the Polish school, or other groups who use the facilities?



- You do share your collection plate, which connects you to the surrounding community and might be a way to welcome visitors. However it is unclear whether this is being leveraged for that purpose.
- Right now your welcoming and ushering is done by the Connections Teams. These people are not trained, do it infrequently, and may have never had any training in welcoming. This is a very weak point in an area that the congregation is very concerned about. BTW, the Membership committee feels that the whole congregation could benefit from some learning in welcoming and greeting.
- As you know, the fellowship space is small and is often too crowded and loud. It is also not an obvious room to a new visitor. You might consider allocating more of your narthex space to the welcoming function; with a bigger table, more displays about congregational life, and quieter environment for visitors to talk with someone about the congregation.
- The congregation's self-definition statements are quite internally focused. These include the mission statement, vision statement, chalice response, and unison affirmation. Anything outside of the congregation is mentioned in passing, and all lack outreach or welcoming language. These are subtle signals that might affect how welcomed a visitor might feel.
- From a financial perspective, the yearly auction, gallery income, and endowment earnings are all dedicated to internal needs. Although this may be necessary to the budget at present, many congregations are able to fund mission partners through one or more of these vehicles. This creates a connection to the external community which can be a conduit for people to find you.

#### Attending to Member

- When communicating to the congregation, the needs of people at each level of engagement should be considered. For instance, a line item budget communicates information effectively from leaders to other leaders. Because it contains so much complicated context and insider knowledge, it is unintelligible to most newer members. A program based budget is much clearer and less codified for attenders and new members. The annual drive brochure is an example of this communication from leaders to the broader membership, done well.
- Similarly a stated vision and clear purpose is welcoming, particularly if that purpose includes outreach/inclusion. When you tell people where the train is headed, they will know if they want to get on board.
- You currently have 70 pledging friends, which is a considerable amount considering "Friend" is not an official status or has any definition at East Shore. In addition, I heard a number of people say they were attending, participating, contributing, and serving the congregation for many years without becoming members. I understand that there is a group of adults who just hang out in Religious Education building on Sunday; they are neither volunteer teachers, nor attending services. These are examples of a membership culture that can be strengthened. Part of this is articulating the benefits of being a member of East Shore (aside from access to challenging volunteer jobs!) so you can help people find a place in your community, not just hang on the edges.



### Member to Involved

- Once people are members, what guidance is given them for how to connect? Lack of connection is a key reason why people drift away from large congregations. Make it a simple and immediate way to make social connections, not a longer commitment. Connections teams might help with this, but right now they are not effective for this purpose. Note: this is an area that all larger congregations always need to work on and keep improving.

### Involved to Leader

- Right now, the majority of congregational leadership recruitment is done directly by the board. This must be impossible to do well along with other board duties.
- There seems to be no invitation or guidance to any kind of “leadership track.” This might be a leadership skills development program, an orientation to lay leadership, or a mentoring program. These types of effort not only help you get to know newer potential leaders, it signals to the congregation that you are looking for them and want to welcome them into leadership.
- Currently some committees are run in an old fashioned way, where most business is done in live meetings, often at times that do not fit for diverse age groups, and a lot of detail is discussed before deciding by consensus what to do (generally, consensus is almost impossible with UUs). There are more modern and easier ways to organize task groups, have leaders making decisions, and members taking on discrete time-delimited tasks.

### **Congregational Myths?**

In talking to a range of lay leaders, I found a number of commonly held ideas, which are either not grounded in factual information or have been generalized to be an overly-broad narrative. It might help to assess how true they are and do some education about them to ease stress and anxiety among congregants. Note: “myths” are hard to work on and address creatively – they always just seem to *be*, and are considered intractable. Myths often contain a core of truth, which can usually be worked on and improved. Here are four potential myths:

1. **Membership is declining and has been for a long time. We are on an inevitable slide of dwindling membership.** Your data shows that you have had an incremental reduction in membership numbers since 2009. During the same period you have had low and high points with visitors, like a high in 2012 (203 visitors). New members joining has had lows and highs during this period, like the high of 32 in 2013. Resigned members has also gone up and down. This may not indicate an inevitable shrinking (people won’t come, don’t like us, we are offering things people don’t want), but that overall your losses are exceeding your gains. This can be addressed through the welcoming and membership resources and processes. See more about this in the Circles of Engagement section above.
2. **Everyone in the congregation is old** and its corollary, **we will only grow with young adults.** My visit to the congregation disproved that everyone is old. I met with quite a few young adults and middle-aged people, and saw many of them at Sunday services. In fact I saw a lot of children and youth as well on Sunday, as there is an effort underway to integrate people who are normally in a separate building on campus (the religious education building). This physical





separation may be exacerbating this belief. This myth does a disservice to all age groups – as our elders are valuable and important members of our beloved community and this myth also does not recognize (*disregards*) people in other age groups. An all-congregant demographic survey might give factual information about who is engaged in the congregation now. Also many congregations grow with people of all ages, and by increasing other types of diversity like people of color or faith belief groups. For instance, if you became known in the community as having a vibrant and active Buddhist group, you would probably attract people seeking that.

3. **We can't hold onto staff**, it is all of our fault or there is some terrible problem in the administration building. You have had unusual staff turnover in recent years, however there seems to be a number of factors contributing to that. First of all, you recently let a longer-termed key staff member go, who was having no performance issues or complaints. Secondly, when authority, responsibility, and reporting are not clear or people challenge them – which seems to be the case now – staff members may become frustrated or unhappy and want to leave. Also, you may want to look at your hiring process to see if you are finding people who are a good fit at the outset. Many congregations share the experience that certain positions are very hard to fill and hold those employees, particularly in larger congregations, such as the administrator. Large congregations need administrators with a broad set of specialized and executive skills, who can adapt to congregational culture. Larger congregations struggle to meet the salary needs of these highly skilled staff members, and these people are often recruited by other nonprofits or corporations. It is not impossible, you just need to find someone who is looking for a position like this, and fits.
4. **We are always right on the edge of our finances** (we are unsustainable). We have data about this, which informs this possible myth. Your endowment is a reasonable size; you are not spending it down recklessly, and its purpose is a financial cushion for a “rainy day.” You have recently undertaken a painful “right-sizing” of the budget, which puts you on more solid footing. The congregation contributes 79% of the total budget. This is the most dependable source of financial fuel and is higher than the 73% that is average in large UU congregations. Your most recent annual budget (pledge) drive was successful. You have a good balance of consistent rental income (10% of budget). Still, you have a substantial mortgage payment to make every year and a larger campus than many congregations, so your overall expenses will naturally be a little higher than average. These are not crushing debits and you have been working to control costs.

### **About Stewardship**

As stated above, this year the annual drive was successful, which is a powerful signal of commitment by the congregation. Here is some information to help you continue that forward and strengthen it further.

- Although clearly some congregants are concerned about leadership in the congregation, the group as a whole has stepped in generously to fund the budget. Build on this by growing more confidence in your leadership.





- Stewardship needs more support for their work. This can be done by ensuring more consistency in the committee, engaging more people on the committee, having rotating co-chairs, and doing active succession planning. This will help it from being “reinvented” every year, and from burning people out.
- There are a good number of opportunities in the congregation to have an “exchange relationship” (I give money and directly gain something personally or materially in exchange). These include the auction, gallery, fees for children/youth religious education, fees for adult education, and other fundraisers. This makes it confusing for your congregants to know what their priorities for giving should be. This is often true in settings with a successful auction: Some people expect to donate at the auction every year, so consider that when formulating their pledge amount, and reduce it.
- However a financial commitment (pledge) can be a *transformational* gift. Transformational gifts are an investment in a mission or purpose, not calibrated by what one might gain personally. With these gifts, the scale of the gift might transform the organization receiving it, such as a sizable endowment gift, or might transform the giver, such as someone who derives deep meaning or satisfaction from their giving. Transformational giving is possible with the annual drive, and is highly unlikely through an auction purchase.
- The endowment is a reasonable scale to the rest of the congregation (not too large or too small to adversely affect the annual drive), yet it has no clear purpose aside from a financial cushion for unspecified circumstance. In this case, it will probably not attract the additional gifts it might and may also cause people to not give to their capacity, because the congregation already has a substantial nest egg.
- Currently, about 60% of your members are pledging. Now not every individual member pledges, because they are part of a pledging household, yet this percentage is useful when comparing it to other congregation. The average rate of pledgers to members in large UU congregations is 67%. That might mean that you have more multi-member households than the usual large UU congregation. However 7% points is a large enough comparative difference that it indicates you can have more of your members pledging regularly (this is aside from your *friends*, who don’t count as members).

#### IV. RECOMMENDATIONS

With an engaged congregation, mature minister, and passionate leaders, East Shore has many opportunities to grow and thrive. This potential may be supported by the following initiatives:

##### 1. **Articulate and Agree to a Bold Mission and Vision for the Congregation**

You already intend to do this. Your recent past processes may have yielded some raw content that can contribute to this process. Be mindful that in some senses, you are not creating a vision, you are discovering one that the whole congregation can join with. Creating a brief and inspiring recent past history of the congregation will help with this. The timing of this visioning with whole congregation input is important; it can integrate and energize the congregation, yet the process can also surface divisions and provoke turf defense reactions.



## 2. **Get Clear about your Governance Program**

In order to reestablish greater trust in congregational leadership, you all need to get clearer about what you are doing and not doing, how staff relates to the board, and how well you are performing. Your key documents should be redone to create internal consistency. You are already working on your communications. Part of this might be the board making a statement about what it has learned over the last number of years, how it intends to function now, and what changes it has made to congregational systems to make them better. You will also need to work with the minister to insure a realignment of staff covers the essential staff tasks, in the wake of staff changes.

## 3. **Look to Improve Welcoming and Address your *Friends***

Quite a few ideas to improve welcoming, at all levels of congregational engagement, are listed in the Circles discussion above. It might be useful to think of *way-finding* in terms of the physical (making it easier to find you in Bellevue, maps and signage are helpful for this) and organizational way-finding. For the latter, it is important to gain feedback from newcomers to understand where they get “lost” in finding their way to participation, service, caring, growth, and belonging at East Shore. Some people are naturally good at cultivating “beginners mind” and can help identify codified language or barriers to engagement, so look for leaders who can do this. In addition, try to reduce the number of *friends* of the congregation and strengthen your culture of membership. Work individually with people who are long-time congregants or supporters, yet not members, to determine what is preventing them from signing the book. Generally, friends will not be as supportive to the congregation as members, and may be cutting off their own opportunities for deeper belonging.

## 4. **Provide More Support to Your Annual Drive**

Build on the success of this year by making the organizational changes you can, like addressing *friends*, improving the stewardship orientation for new members, and working with an endowment committee to create a more compelling and clear purpose for the endowment. Help to recruit for and create a more sustaining annual drive team that has the capacity to do broader work in the congregation about stewardship education. Help to build a context for your exchange-oriented fees and fundraisers, so that people understand the priority of the annual giving. And consider slowly having some of these generated resources start benefiting ministries outside the congregation (which still goes through the annual congregational budget).



V. **RECOMMENDATION FOR CONGREGATIONAL STEWARDSHIP SUPPORT**

As discussed during the Next Steps Weekend, the consultant offers additional services to help implement the above recommendations. Please consider the following consulting services and timeline for their implementation:

Activity	Schedule	Recommended Consulting Hours	Consulting Fees @ \$125/Hour*
1. Implement the <b>Searching for the Future (SFTF)</b> process, adapted for a large church setting. This efficient visioning process is described in Beyond Fundraising and has been used successfully by many congregations across the denomination.	Fall 2015 or Early Winter, 2016	40 Includes visit, phone conference, and e-mail support	\$5,000
2. Gain support for strengthening the annual drive committee, recruitment and leadership succession, also for growing stewardship education year-round. Note: these can be hours added on to the SFTF agreement.	Fall 2015	8	\$1,000

*\*Note – Consulting hours is a not-to-exceed amount stipulated in the Agreement document. Not all of this time may be used and actual hours used will be billed. If travel is part of support, the time to travel one way from consultant’s office to work location shall be included in the consulting hours total. Travel costs will be considered separately. This may include actual cost for air or rail travel, rental car and fuel, mileage for the use of personal vehicle (at the IRS business mileage rate then in effect), actual cost for lodging, meals and incidentals.*



### **Additional Resources**

- The book, [\*Beyond Fundraising\*](#) is a valuable tool for all congregants.
- The [FORTH: Stewardship Development Program](#) is available on uua.org. Recheck this to see if there are resources there that you are not currently using.
- [The Wi\\$dom Path](#) program and book [The Generosity Path](#) are great ways to help your members start thinking about money in deeper ways.
- The [UU Stewardship Lab](#) on Facebook is a great way to ask questions and gather ideas.
- The [UUA Pacific Western Region](#) is a source for all kinds of information and support.
- [UUA Listservs](#) are valuable resources for gathering intelligence from peers across the country. There is a nation-wide listserv for almost any interest area or need.
- To engage the children and youth in stewardship, consider integrating [Stewardship: The Joy of Giving](#) into your RE curricula.
- The [Stewardship for Us blog](#) has regular articles about congregational stewardship. There is also an E-Newsletter you can sign up for on the blog page.
- The video [Drama to Provoke Generosity](#) from the Eno River UU Fellowship in Durham, NC is a great tool to open up deeper considerations of stewardship.

### **1. CLOSING**

The East Shore Unitarian Church is a strong, vibrant, and spirit filled congregation. Although a number of recommendations are provided, they are with the intent of helping you move toward your greatest congregational ambitions. It has been a pleasure and an honor to consult with you. I look forward to the opportunity to provide additional consultation and help to guide you toward a new vision and plan to achieve your dreams.

I will contact Jack Slowriver, on the Board, within the few weeks to see if there are any questions about the report and to discuss further support.

Faithfully submitted,

Mark Ewert  
UU Stewardship Consultant  
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Copy to: Janine Larsen, Pacific Northwest District Executive



**Appendix A**  
**Unitarian Universalist – Next Steps Weekend**  
**Consultant: Mark Ewert**

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**The East Shore Unitarian Church**  
**Schedule – May 15-17, 2015**

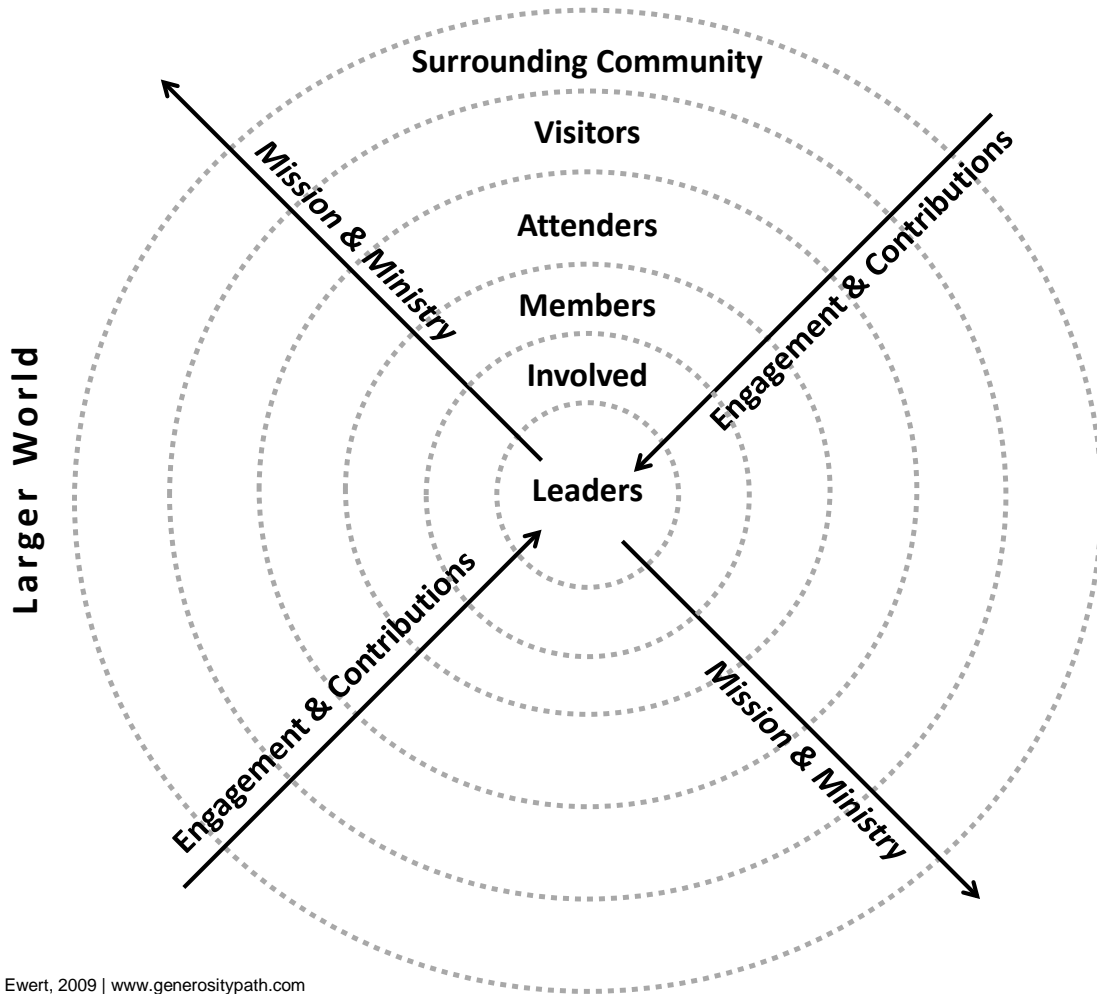
<b>Friday</b>	
5:30 pm	Mission/Vision Planning Group
7:00 pm	Board and Minister
<b>Saturday</b>	
8 am	Grounds/Facilities tour and information
9 am	Social Justice Ministry Team
10 am	Finance Committee and Treasurer
11 am	Stewardship Committee, Operating Fund Drive, Endowment Committee, Auction
Noon	Lunch with various non-leaders
1 pm	Membership Coordinator and Committee, Gallery Committee
2 pm	Committee on Ministry, Beloved Conversations Group
3:15 pm	Director of Religious Education and Committee
4:15 pm	Caring Committee, Pay Pastoral Ministers
<b>Sunday</b>	
9:30 am	Attend worship service
10:30 am	Consultant shares verbal summary with congregants
11:00 am	Attend worship service
12:30 pm	Consultant shares verbal summary with congregants
1:00 pm	Consultant meets with Board of Trustees & minister to discuss next steps
3:00 pm	End of the assessment visit



**Appendix B**  
**Unitarian Universalist – Next Steps Weekend**  
**Consultant: Mark Ewert**

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**Congregational Circles of Engagement**



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