

Dear UCM Members and Friends,

The UCM Governing Board would like to share with you all the Feasibility Study report from the financial feasibility study consultants, Christine Graham and Shana Trombley of CPG Enterprises, Inc. First, thank you to everyone who agreed to be interviewed as part of the study, without your honest and candid responses we would not have this important information that is so critical to helping us all make decisions for the future of this congregation.

As you will see in the report, the consultants were impressed with the commitment our members have to our congregation and the work we do for each other and for the broader community. They found strong support for the BFF project, noting that “[t]he members of the UCM are a committed, caring group who will support the campaign to the best of their ability.” The consultants did conclude that UCM’s capacity to raise money is more limited than the plan demands. Ultimately, they projected total capacity for a capital campaign to be \$800,000.

The report identifies the following recommendations: addressing the universally supported staffing and compensation increases through the annual budget drives rather than the capital campaign, developing a five-year incremental plan that includes distinct phases of the BFF project, and recommendations to help build successful culture of stewardship and run an ultimately successful capital campaign.

We hope that you will read the Feasibility Study Report and begin thinking about how we can continue to build the culture of stewardship that will allow UCM to implement appropriate staffing levels with the benefits and compensation that our staff deserves and define a vision for the future of our physical space and how we make that vision a reality.

The Board will host a “Chat with the Board” on Sunday, January 19 during each Coffee Hour in the upstairs classroom and plans on further congregational discussion as we determine next steps for this project.

With sincere thanks to all of you, and commitment from all of us,

The UCM Governing Board
January 8, 2020

Executive Summary

The mission of the Unitarian Church of Montpelier is to welcome all, serve human needs and protect the earth. Its programs focus outward, in addition to serving its members. As this congregation considers work on its building, its members have taken a responsible approach to planning to meet programmatic needs, compensate their staff, maximize the service of their historic building, and fit this within their financial capacity.

The members of the UCM are a committed, caring group who will support the campaign to the best of their ability; but their capacity is more limited than the plan demands.

The members of the church have identified five priorities.

- Improved staff benefits and work demands.
- Accessibility including an elevator.
- Kitchen upgrades, particularly to facilitate the community meals program.
- Energy efficiency through a series of actions and committed to net-zero.
- Expanding available space, through an addition, reconfiguration, and improved office and meeting room space.

The staffing component is by far the highest priority for members, and we recommend the it be phased in through deliberate and personalized efforts to increase members ' stewardship donations. While this may be somewhat slower than hoped, it will be sustainable and will grow with the congregation.

For the capital components, we recommend two or three phases, starting with accessibility and based on a careful reassessment of floor plan reconfiguration. The next phase would be the kitchen work, also based on reconfiguration and without the proposed addition. Finally, we suggest the net-zero project and the remaining reconfigurations suggested by the reassessment. We do not find an appetite for the north side addition and realize this means the floor plan reassessment is a critical early component of this plan.

In our interviews with members of the congregation and some community members, we have found that the proposed \$2.42 million campaign to implement these priorities is not realistic at this time. We can suggest a total capacity at this time of \$800,000 and assume some immediate capacity will be diverted into the stewardship increases. In order to preserve as much of the \$800,000 in potential capital gifts for capital improvements we advise a methodical and gradual increase in stewardship giving to achieve the desired staff compensation and benefits. Some donors are committed to only one or two of the capital priorities, so some donations will likely be restricted. With a slower, phased approach, a larger amount could ultimately be raised.

While the recommended fundraising goal may be disappointing, we are convinced that the members and some community friends will do their best in supporting this work. The 'slow and patient 'approach to date is a part of the ultimate achievement of these goals. Persistent, deliberate and heartfelt work is in the nature of the UCM membership, and is the key to success.