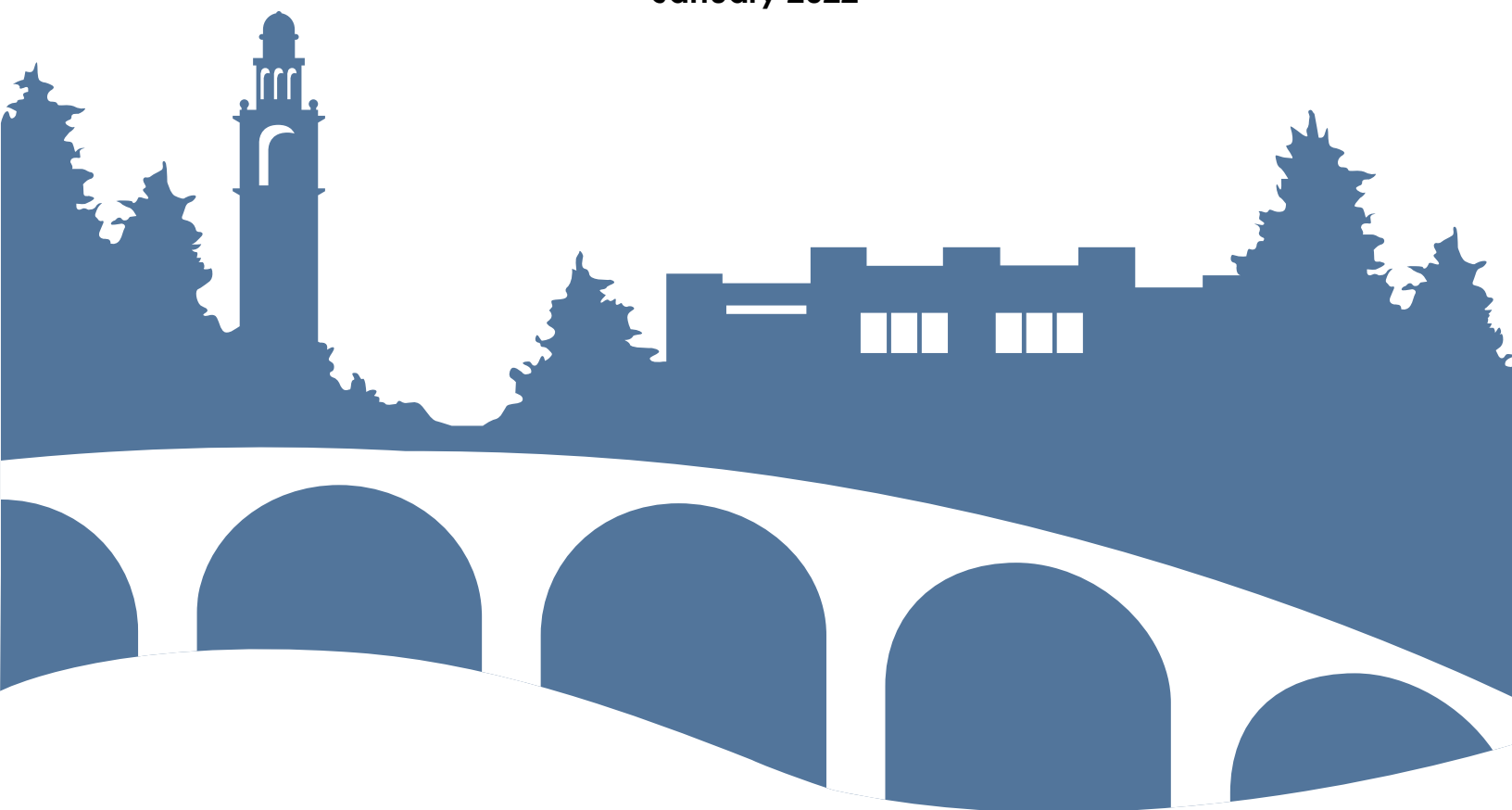




# **EMBRACING OUR FUTURE**

**Capital Campaign Steering Committee  
First Unitarian Universalist Church of Richmond  
Final Report  
January 2022**





IN MEMORY OF

*Reverend Jeanne M. Pupke*

who inspired us to believe in the possibilities  
for the future of our church

## A Letter From the Capital Campaign Committee

On behalf of the Steering Committee, we submit this report to the Board and congregation to document the process, progress, and results of the recent capital campaign. Originally envisioned as a one-year endeavor, the coronavirus knocked our plans off kilter. Instead of wrapping up by December 2020, we completed active fundraising in December 2021 and disbanded the Steering Committee in January 2022.

Our Covenant calls us to “commit our time, talents, and financial resources” to First Unitarian Universalist Church of Richmond. This campaign asked that of us--and then some. Because of the challenges due to the pandemic, along the way we questioned the wisdom of asking our members to commit to a robust future for the church when we have not been able to gather in physical community since early March 2020.

But we are glad to have persevered. To say we are gratified by the generosity shown by our fellow congregants is an understatement. The campaign surpassed everyone’s expectations. Many members, irrespective of their financial means, reached deep into their hearts and pocketbooks to support the campaign priorities of replacing the aging roof, investing in improvements to our energy usage as the first step in reducing our carbon emissions, and paying off the debt remaining from the transformative renovation undertaken in 2012.

This effort would not have been possible without those who supported our work throughout the campaign:

Denise Rimes, Board President and the Members of the Board of Directors

Reverend Jeanne Pupke, Senior Minister and Reverend Sherman Z. Logan Jr., Executive Minister

Margaret Rush, Congregational Administrator

Canvas volunteers Autumn Fehr, Anne Joseph, Joan Lewis, Ralph Graner

Task Force on Roofs and Clean Energy Improvement: Thomas Norton, Joe Rupp, Charles Gerena, Michael Gibson, Reggie Henderson, Michael Testerman

Liz Coit of Stewardship For Us, our campaign consultant, deserves a separate acknowledgement. None of us had experience in raising funds, particularly during a pandemic. Liz was unfailingly positive and supportive, assuring us repeatedly that she knew our members would rise to the occasion. She trained us in the mindset, tools, and procedures needed to run a successful campaign. We literally could not have done it without her. Our second stroke of good fortune was hiring Angela Lehman as our Campaign Assistant. She proved adept at the ICON database, writing and editing, and generally keeping us on track. Finally, we are grateful to Jessica Saybe for designing attractive campaign materials and working with printers to produce them in a timely manner.

We sign off from our charge with a sense of accomplishment and deep appreciation, especially for this little community we shared for the past 26 months. Aside from family and close friends, we spent more time in (virtual) community with each other than with almost anyone else. We were motivated by our love for First UU and buoyed by the generosity of so many of you.

**Anne-Marie McCartan & Kevin Thrasher, Co-chairs**

Steering Committee

**Marjorie Crowder, Thomas Foster, Dorothy Gerena, Joe Rupp, Erica Sims, Diana Vincelli, Gary Zwicker**

# EMBRACING OUR FUTURE

## Capital Campaign Timeline

2019

### October

Congregation votes to approve a \$2 million capital campaign

### November

President Jim Armstrong names a Capital Campaign Steering Committee (CCSC) and charges it with conducting a campaign through 2020. Anne-Marie McCartan and Kevin Thrasher agree to serve as co-chairs

### December

CCSC begins organizing its work

2020

### March

Board grants a request from the CCSC to pause work to consider the impact of the pandemic

### August

CCSC resumes meeting and receives approval from the board to extend its work through 2021

### November

Liz Coit of Stewardship For Us is hired as the campaign consultant  
Anne-Marie McCartan agrees to serve as volunteer Campaign Manager

2021

### February

CCSC recommends to Reverend Sherman Logan that a Task Force on Roofs and Clean Energy Improvements be named to determine likely costs of addressing problems with the roof and installing solar panels along with making other improvements in energy usage

### April

CCSC chooses “Embracing Our Future” as the campaign slogan  
Task Force on Roofs and Clean Energy Improvements, led by Tom Norton and Joe Rupp, reports out its findings

### May

Liz Coit conducts a Financial Feasibility Study, interviewing 38 households. Her findings indicate that we should be able to raise just under \$1 million

### June

With the Board, CCSC co-hosts a going-away celebration in the Courtyard for Reverend Sue Sinnamon and Music Director Diane Woodruff

### Summer

CCSC continues to meet; campaign materials are developed

### August/September

Two video conferences are offered to the congregation for presenting the findings of the Financial Feasibility Study and the Task Force on Roofs and Clean Energy Improvements

### September

Trained volunteers begin canvassing leadership donors (members of the Board, ministers, CCSC, and those with a history of generous giving)

### October

Campaign kickoff events are held, announcing \$800,000 in leadership gifts

### December

Conclusion of active canvassing, with nearly 100 households visited in person or virtually

2022

### January

Wrap-up activities, including writing a final report for the Board and congregation

### May/June (TBD)

Campaign celebration

Donations will be received through December 2023

## Capital Campaign tasks and priorities

	<b>As adopted by congregation 10/13/19</b>	<b>As of 01/15/22</b>
<b>Church Renovation Mortgage Satisfaction</b>	<b>\$990,000</b>	<b>\$888,500</b>
<b>Garrett Street Mortgage Satisfaction</b>	<b>\$95,000</b>	<b>folded into renovation loan, above</b>
<b>Roof Replacement</b>	<b>\$280,000</b>	<b>\$900,000(est) incl. energy improvements</b>
<b>Capital Replacement Reserve</b>	<b>\$120,000</b>	
<b>Staff Transition Expenses</b>	<b>\$155,000</b>	
<b>Campaign Expenses</b>	<b>\$200,000</b>	<b>\$ 24,400</b>
<b>Pledge Shrinkage</b>	<b>\$160,000</b>	

Of the \$2 million goal approved by the congregation in October 2019, \$1,307,000 has been raised to date. As shown in the table (above), costs for the mortgages and campaign expenses are now lower, and the estimated cost for the roof work is considerably higher (see Appendix 1 for estimate of project costs). As the Board has prioritized the roof and energy project and debt reduction, no funding is anticipated to be available for a capital replacement reserve, staff transitions, and pledge shrinkage.

## Participation rate

Several challenges confronted this campaign. The most recent capital campaign was approved in 2012, with members making contributions through 2015. Thus, many members who supported that campaign to renovate the church felt as though they had only recently finished making their contributions.

Further, the backdrop for the fundraising portion of the campaign (September-December 2021) was the coronavirus pandemic. This harsh reality impacted the campaign in several key regards:

- The pandemic hit some members particularly hard--through job losses, challenges of online schooling, lack of reliable childcare, and simply the emotional effect of the isolation and uncertainty that many experienced. For these people, finding funds to support the church's capital needs was not high on their priorities.
- The church suspended building-based events in early March 2020 and largely remained closed for in-person services and small-group meetings throughout the campaign. This severely limited the ability of the campaign committee to make announcements in person, chat with people at coffee hour, set up a table with literature and have representatives available to answer questions, and to be able to drop in on small-group meetings.
- Without our usual activities, it was difficult to determine who remained active in the church and who might have chosen to become inactive. Further, a number of people wearied of online services and stopped "attending" on a regular basis – thereby missing periodic announcements and sermons about giving. We spoke with some members who chose not to support the campaign because of dissatisfaction with the handling of returning to church or religious education during this period.

Despite these extraordinary challenges, the extent to which members participated in the campaign is remarkable. Their love of First Unitarian Universalist is so deep and strong that many made generous commitments to the campaign.

We set an ambitious goal of having 100 percent participation in the campaign. Our goal was based on a listing of all households (“giving units”) who had made a contribution to the annual fund in FY19 or FY20. This number totaled 332 households, 115 of which included a second member, for a total number of 447 active members. (This number does not include persons who joined the church after June 2020 and made a contribution, nor those who consider themselves church members but do not have a recent giving history.)

Annual Fund Contribution	Households in range	Percentage of households participating in campaign
\$10,000+	14	100%
\$5,000 - \$10,000	28	88%
\$3,000 - \$5,000	38	67%
\$1,000 - \$3,000	121	50%
< \$1,000	131	36%

As might be expected, the rate of participation in the capital campaign declines in relation to annual fund giving. This posed a challenge as a full 75 percent of the congregation contributes under \$3,000/year. Ultimately—despite telling members that contributions of any amount would be valued—only 56 percent of households made a commitment.

Ten church members told us they would not be supporting the campaign, mostly because of financial circumstances or ill health. Several others moved or resigned their membership. Others who have not committed to date simply did not respond to mailings, emails, and phone calls, or were unaware of the campaign.

## Commitments to the Campaign

A total of 178 households made commitments. Gift amounts ranged from \$5 to \$125,000. (See Appendix 2 for Donor List.)

Households	Commitment
1	>\$100,000
8	\$30,000 - \$99,999
11	\$20,000 - \$29,999
7	\$15,000 - \$19,999
27	\$10,000 - \$14,999
20	\$5,000 - \$9,999
71	\$1,000 - \$4,999
41	\$1 - \$999

Income and Expenditures as of January 2022	
Loan payments and financing costs	\$ 37,213
Campaign expenditures	\$ 24,400
Available in campaign account	\$652,000

## Recommendations

### Begin the roof and energy project

So many donors made all or some of their contributions up front (~\$650,000) that President Denise Rimes has named Tom Norton to head the First UU Roof and Energy Improvement Project Team. The Team has begun making plans for this top campaign priority. Expect periodic reports from the Team, along with seeing evidence of progress when we are back in the building. Because most of the work will be external, the planners anticipate minimal disruption to church activities.

### Celebrate the conclusion of the campaign

Typically campaigns end with a joyous celebration. As that is not possible due to the current health situation, we plan to do so later in the spring, likely in conjunction with an event such as a “groundbreaking” for the roof project, a piano benefit concert, or a farewell to outgoing minister Reverend Jeanne Pupke.

### Plan for expending income

We recommend that CCSC representatives meet with Tom Grahek, Treasurer, and the Finance Committee to develop a strategy for how funds should be expended, to be forwarded to the Board.

### Consider the future of 2900 Garrett Street

The Steering Committee concludes its work about \$500-700,000 short of its initial ambitious goal. During the campaign, the question of whether the church should sell the Garrett Street house came up periodically. Those making a case to sell the house argue that, with a likely sale value around \$400,000, proceeds could retire the renovation loan, thus freeing up \$78,000 (\$6,533/month in interest and principal payments) per year from the operating budget for years to come. In other words, sale proceeds around \$400,000 along with anticipated income from the capital campaign by December 2023 would effectively eliminate the remaining mortgage. Additionally, short- and long-term maintenance costs for upkeep of the house are not budgeted.

Those believing the house should not be sold say that we will need the space to grow (for offices, classrooms) in the future. Further, the rental income provides about \$10,000 annually toward the operating fund.

A few people suggested that, if the property were to be retained, the church should be purposeful in who could most benefit from renting it (e.g., ministerial interns; church members who are temporarily unhoused).

The Steering Committee is not of one mind as to the best disposition of the house. *But we do agree that the Board should engage an outside consultant to conduct an analysis of the costs and benefits of retaining versus selling the property.* Without such an analysis, to be reviewed by the Board and congregation, we are by default choosing to retain the mortgage over selling the property.

### Appoint a Strategic Facilities Planning Committee

As we discussed previously with the Board, we see the need for an active facilities planning committee, as provided in the Church Bylaws. In addition to the team overseeing the roof/energy project, a standing committee is needed to attend to the upkeep of the building and grounds for future generations. Most immediately the committee can attend to deferred-maintenance items and, once the roof/energy project is completed, it can address recommendations made by the Task Force for additional ways to move toward reducing our carbon emissions.

### Reconsider participation goals for future fundraising

Our goal of 100 percent of participation in the campaign was not realized, with 44 percent of households not making a commitment. Although this is similar to the participation rate (reportedly 50%) from the previous campaign to renovate the church, clearly we set an unrealistically high goal, hoping that our message of “no commitment is too small” would motivate everyone to pitch in. Future stewardship and capital campaigns should be cognizant of the difficulty in convincing members *at all giving levels* that their contributions are important as part of their participation in our church community.

### A final note

Although the campaign was successful on many fronts, the bottom line is that it concludes leaving approximately \$400,000 remaining on the mortgage. As more and more young adults and families find their way to our faith community, it seems unfair to saddle this generation with indebtedness that was not of their making and that they may not easily have the means to repay. In addition, as we seek a new senior minister in the coming year, ideally they would not be coming in confronted with this debt.

Thus, we welcome anyone who has not yet joined the campaign to do so going forward. Additional fundraising initiatives and commitments to the campaign will continue to be accepted through 2023. The church website and giving platforms will continue to offer “Capital Campaign” as a donation option. Please consider making or increasing your commitment to our church’s future.

## Appendix 1 ROOF AND ENERGY BUDGET ITEMS

### Estimate of Probable Cost - Roof and Energy Improvements

ITEM	COST	SOURCE
Roof replacement	\$350,000	One written proposal and two verbal/informal estimates from roofing contractors
Edge buildup for insulation	\$20,000	Estimate based on unit price from one contractor
Tectum deck replacement	\$10,000	Estimate based on unit price from one contractor
Replace 7 sets of clerestory windows	\$60,000	Estimate, budget quote received from one contractor
Facia replacement	\$30,000	Allowance
Solar ready stanchions over Great Hall	\$20,000	Estimate \$5/sqft, Allowance recommended by subcommittee
Solar panels over Great Hall	\$85,000	Quote from supplier
Construction manager and architect	\$100,000	Estimate by subcommittee lead
Contingency/escalation	\$225,000	33% based on current market volatility and to cover a portion of the upside estimate accuracy
<b>Total Recommended for Budget</b>	<b>\$900,000</b>	

Source: Task Force on Roofs and Clean Energy Improvements  
August 2021



## Appendix 2

# CAPITAL CAMPAIGN DONORS

**Janet Aardema and Dan Gagnon**

In memory of Lucia Bremer

**Sharon Amoss and Robert Staley**

**Douglas Anchor**

In memory of Cynthia B. Anchor

**Jim Armstrong and Anita Lee**

**Kate and Richard Barrett**

**Gary and Debbie Bartle**

**Leslie Baskin-Asip and Michael Asip**

**Barbara Beasley**

**Julien Belair and Jaime Lawson**

**Bob Blinn**

**James and Anne Blowers**

**Joel Blum**

**Eric Bowers and Stephanie Fox**

**Connie Boyer**

**Helene Bumbalo**

**Laura Cameron & Lee McCown**

In memory of Gary McCown

**Rick Carr and Carol Jorgensen Carr**

**James R. and Diane Carter**

**Jean Carter**

**Sheila Chandler and Steven Saltzberg**

**Jean Clark**

**Jeffrey and Lorna Clark**

**Ginjer Clarke**

In memory of Peter Ericson

**Craig and Jessica Coffey**

**Kelly Coleman**

**Donna Crawford**

**Marjorie Crowder**

In memory of Rowland and Marjorie Crowder

**Janine and Paul Daniels**

**Lillian and Walter Dean**

**Wendy DeGroat and Annette Marquis**

In memory of Rev. Dave MacPherson

**Dee DeRoche**

**Paul Dolci and Josie Sichi**

**Diana Donald**

**Norma Doss**

In memory of Rev. Robert M. Doss

**Donna Doyle**

**Darlene Dragavon**

In memory of Reverend David Hicks MacPherson

**Joy Duke**

In memory of James M. Duke

**Amanda Dulin**

**Carol Dunlap**

In memory of Honey Poo Pie Dunlap

**Noel Einoff**

**Howard and Gloria Fabry**

**Autumn Fehr and Jeff Stutzman**

In memory of Rev. David Hicks MacPherson

**Melissa Ferrell**

In honor of Rev. Rolfe Gerhardt

**Thomas Fitzpatrick & Gretchen Garber**

In memory of Jeanne Pupke

**Thomas and Helen Foster**

**Nancy Fowler and Sue Murdock**

**John and Sasha Freyer**

**Alex Gecker**

**Charles and Dorothy Gerena**

**Hazal Gokmen**

**Tom and Tina Grahek**

**Ralph and Jocelyne Graner**

**Rashida Gray and Reginald Gordon**

**Camille Harris & Dennis LaMountain**

In memory of Rev. Jeanne Pupke

In memory of Charles MacLean

**Rev. Faith Harris**

**Charlyn Harrison**

**Reggie and Barbara Henderson**

**Thalia Hernandez**

**Dorothy Hollahan**

**Raidah Hudson**

**Diane Hyra**

**Harvey Iwata**

**Suzanne Jenkins**

**Douglas and Barbara Jones**

**Evaline Jones**

In memory of Edgar Montell Stanley and Haziel Stanley

**Anne Joseph**

**Harvey and Karen Joyner**

**Katherine Judd**

In memory of Bill Judd

**Larry and Audrey Kalbach**

**Mike Kane and Kathryn Spring**

**J. Michael Kastner Jr. and Mindy C. Fast**

**Billie Kelley**

**Joe and Mary Kent**

**Karen and Ben King**

**Russell R. Klemm, Jr., and Linda W. Klemm**

**George and Patricia Knight**

**Pam, David, and Carolyn Kovacs**

**Larry Kruger and Catherine Merchut-Kruger**

**Janice Kuhns**

**Samuel and Aleksandra Kutscha**

**Laurence Landon**

In memory of Les and Joyce Landon

**Amanda Lawrence**

In memory of Rev. Jeanne Pupke

**Sharon Levine**

In memory of Margaret Levine

**Joan Lewis**

**Rev. Sherman Z. and Franka Logan**

**Jerome Lonnes**

In memory of Laurel B. Lonnes

**Leigh Ann Luscan**

**Adele MacLean**

**Dianna MacPherson, Greg Greenway and Erin MacPherson**

**Alice Marshall and Frances Brune**

**Christine Mathews**

**Kevin Mautte**

**Gerald and Laura May**

**Phyllis Tyler McCafferty**

In memory of Rev. David Hicks MacPherson

**Anne-Marie McCartan and John Accordino**

In honor of Rev. Jeanne Pupke and Regina Largent

**Ted Merriman**

**Elizabeth Miksovic**

**Catharine and Greg Moser**

**Eliot and Annette Norman**

In memory of Shirley Norman-Regal

**Thomas and Catherine Norton**

**Elisa O'Brien**

In honor of Rev. Jeanne Pupke

**Robert Odor**

**Robert Odor, Jr.**

**Stan Orchowsky and Sarah Woodhouse**

**Lynn Pappas**

**Ellen Parnell**

In memory of Dr. Basil B. and Ruth Jones

**Jon Pildis and Christy Schragal**

**JoAnne Powell**

**Rev. Jeanne Pupke and Regina Largent**

**Bari Ramsey and Hayat Bain**

**Carolyn A. Raskind**

**Fricka Raycroft and Ned Haley**

In memory of Peter Ericson

**Patricia Reddington**

**Stephen Retherford and Denna Joy**

**Donald Retzer**

In honor of Marjorie Crowder

**Denise Rimes**

In honor of the service and ministry of Rev. Jeanne Pupke

**Jean J. Robinson**

**Bob Rogers and Janet Goin**

In memory of Kathleen van Paasschen and Ian Finlayson

**Carolyn Ross**

**Joe Rupp and Kristin Saybe**

**Margaret Rush**

**Kathy Ryan**

In memory of Al Copolillo

**Ulises C. and Sandra Sanroma**

**Kathy Scott**

**Anne-Marie Irani, Lawrence and Natalie Schwartz**

**Mary Secret and Doug Greene**

**Alexandra Short**

**Suzanne and Warren Short**

**Gill Sigmon**

**Charlene Sinclair**

**Tamara Smith**

In honor of Adele MacLean

In memory of Lenny Blackwood

**Diane and Bob Sneed**

In memory of May and Dudley Brill

**Lois Stanton**

**Margaret Stokely**

**Patricia Sunko-Imhof**

In memory of Peter E. Imhof

**Jan and Ray Tarasovic**

**Ben Teresa and Erica Sims**

**Michael Testerman**

**Christina and Kevin Thrasher**

**Justin B. and Beth Tolley**

**David Tucker**

In memory of Rev. Jeanne Pupke

**Barbara Tulli**

**Martha Tyler**

In memory of Eleanor Kaiser

**Todd Van Gordon and Patricia McNaught**

**Linda Van Tuyle**

**Diana Vincelli**

**Chris Walsh**

**Patti and John Warrick**

**George D. Watkins**

**Douglas and Carol Wayne**

**Katherine Weber and Betsy Shaver**

**Mary Weiser**

**Jerry and Sarah Weissberg**

**Louise Hermine Werner**

**Sally Wetzler**

In honor of Rev. Jeanne Pupke

**Ben and Motoko Wharton**

**DeWitt Whittington**

In memory of Louise Pendry Whittington

**Rick and Laurie Williams**

**Susan and Ron Williams**

**Susanna and Brian Wilson**

**Ann Woodlief**

In memory of Ray Woodlief

**Arnold and Diane Woodruff**

**Terri Wulf-Heller and James Heller**

In memory of Robert Wulf

**Gina and Stephen Wurfel**

**Sally Youngs**

**Gary and Marcia Zwicker**

**Anonymous (11)**

**Anonymous**

In memory of Nigel Barton

**Anonymous**

In memory of Reverend David MacPherson