

Assessment

A. The Mission of Channing Memorial Church. Channing’s mission is articulated in the Seven Principles of Unitarian Universalism and in the Congregation’s Four Purposes. The Four Purposes can be thought of as what the Congregation must do to uphold the Seven Principles and to achieve its vision.

The Seven Principles of Unitarian Universalism:	The Four Purposes of Channing Memorial Church
<p>We affirm and promote:</p> <ol style="list-style-type: none"> 1. The inherent worth and dignity of every person; 2. Justice, equity and compassion in human relations; 3. Acceptance of one another and encouragement to spiritual growth in our congregations; 4. A free and responsible search for truth and meaning; 5. The right of conscience and the use of the democratic process within our congregations and in society at large; 6. The goal of world community with peace, liberty, and justice for all; 7. Respect for the interdependent web of all existence of which we are a part. 	<p style="text-align: center;">To accept and honor free expression of religious beliefs.</p> <p style="text-align: center;">To celebrate who we are and how we differ.</p> <p style="text-align: center;">To encourage spiritual growth.</p> <p style="text-align: center;">To be a caring church family that works together to make the world a better place.</p>

B. Channing Today.

- i. **Some Demographics.** Channing Memorial Church is a Unitarian Universalist Congregation comprised of 189 active members and 70 active friends for a total of 259 congregants.¹ The Congregation is diverse with respect to age but not race. Most congregants (184) come as part of a couple, both of whom are members or friends. Approximately 30 children (K – 7) enroll in Religious Education programs annually. There are also a number of middle school / high school age children enrolled either in the “Coming of Age Program” or the “Our Whole Life” program.

¹ Statistics derived from 2006 – 2007 Annual Canvass of the Congregation.

- ii. **Size and Makeup.** Channing’s size places it in the category of a program-size church within the “dynamics of church growth model”:

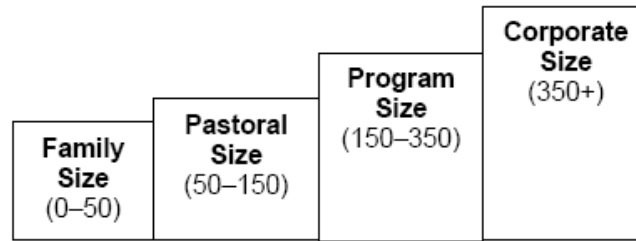


Figure 1: Dynamics of Church Growth Model²

In accordance with this model, Channing should possess the characteristics and resources of a church this size. Several of these characteristics are listed in the following table, annotated as to whether Channing possesses each characteristic.

Characteristic	Y / N?
Entry points through programs are readily available for a wide range of visitors.	N
Minister is seen as a leader, shares information, and provides continuity across program areas.	Y
Members take an active role in the ministry (pastoral care) of the church.	Y
Additional paid administrative staff hired to alleviate administrative burden on minister.	N
A newcomer may find it more difficult to feel attached.	Y
Lay leaders minister to one another in a healthy church.	Y
Church has a stretched cell structure, with many activities and programs expanding faster than the resources required to support them.	Y
Decision making is broadly distributed within the wider leadership circle (perhaps 50 people).	N
Leaders coordinate.	N
Staff members view themselves as participants in a common cause.	N
Standards / performance expectations for staff are formalized.	N
Core lay leaders are experienced in leadership roles, causing processes to be formalized.	N
Many interest groups, committees, programs emerge. Members sometimes feel loyal to a smaller group rather than to the larger church community.	Y

Table 1: Some Characteristics of a Program Size Church³

Note that Channing possesses many of the characteristics of a Program Size Church but is deficient in many of the resources and processes necessary to sustain such a Congregation. This fact was clearly recognized by many leadership groups during the “Year of Decision”:

“Governing Board recognizes that to sustain or expand existing programs and solve property challenges, more resources are required.

- 1. Staff and volunteers are overstretched maintaining existing programs and infrastructure. Many leaders have expressed feelings of burnout even while it becomes more difficult to find other members to take on the challenge of replacing them.*

² Source: Planning for Growth and Vitality for Smaller Mid-size Congregations Workshop – Readings.

³ Ibid.

2. *Financial resources, while significantly greater than 10 years ago, are not keeping pace with needs.*
 - *Property maintenance costs are increasing as deferred maintenance can no longer await action.*
 - *Capital repairs, such as steeple, must be addressed, but it is questionable whether current body of financial contributors could raise enough funds to repair the steeple and make required capital improvements.*
- *Failure to increase resource base could result in long-term diminishment of our ministry and programs as fewer people are willing to take on the work load to sustain them.*
- *Failure to increase resource base could also result in further deterioration of our properties since current funding levels are not sufficient to repair and sustain them.”⁴*

“However, Amy, the staff, and many in the congregation are distracted by increasing emphasis on church administration and problem-solving. Our resources are strained and out of balance, and worship and spirituality are not getting the focus they deserve. (Also, we seem to be organized as a program-sized church, while our resources reflect a pastoral sized church, which may be placing additional strain on our resources.)”⁵

“Currently, the DRE (Director of Religious Education) position is understaffed for the number of children registered in our program under the recommendations of the UUA. This situation hinders growth within the program.”⁶

iii. **Financial Resources and Needs.**

1. **Annual Pledges.** Over the past 10 years, members have increased annual giving by 341% while the number of giving families has increased by 141% as shown in the following graph. The most dramatic increases in total amount pledged took place in FY 99-00 when we decided to call a settled minister, in FY 05-06 when we decided to reclaim an apartment in Channing House for our own use, and in FY 07-08 when we decided to increase the salary and hours of the office administrator and reclaim the entire Parish Hall for our exclusive use. These statistics speak to a dramatic increase in the commitment of the Congregation to sustain this church and help it grow.

⁴ Source: *Governing Board Talking Points of January 2007.*

⁵ Source: *Worship and Spirituality Talking Points of January 2007.*

⁶ Source: *Religious Education Committee Talking Points of January 2007.*

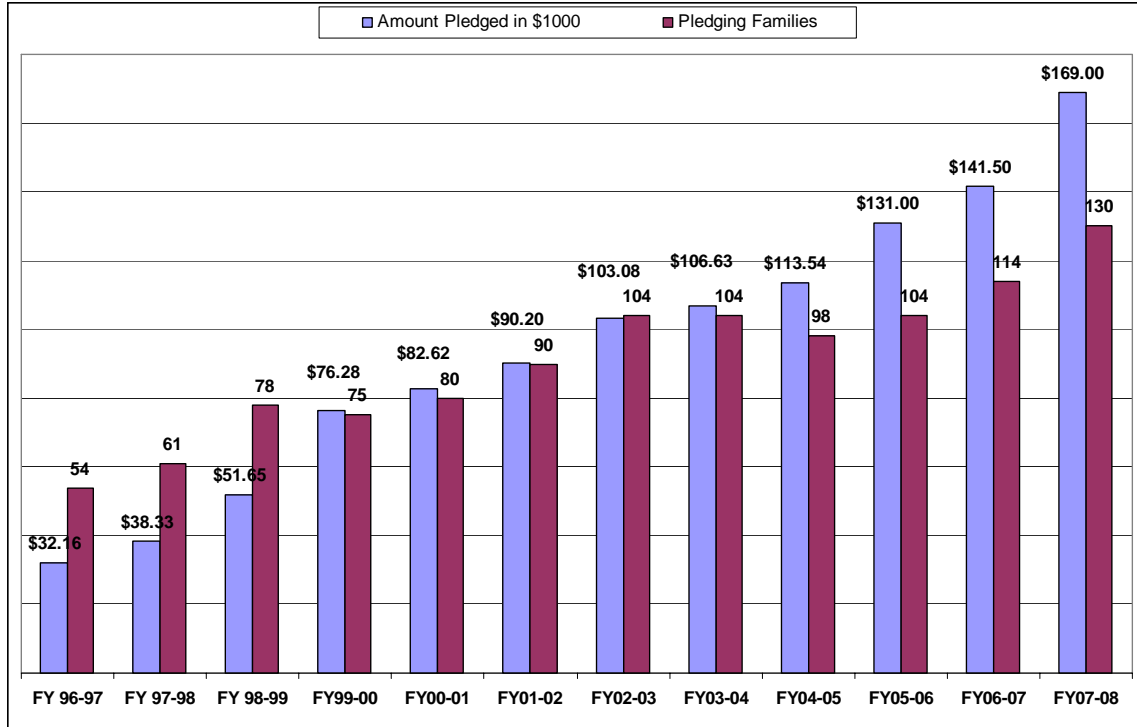


Chart 1: Annual Pledges 1996 – 2007

2. **Endowment Funds.** Channing's non-operating resources include an Endowment Fund (\$120,000), a Margit Baum Fund for use in supporting worthwhile community projects (\$175,000), and an Arthur Barrows Steeple Fund (\$110,000) to be used for the renovation of the steeple. All of the funds are restricted and require Congregational approval to be utilized beyond narrow limits. The Endowment Fund and a portion of the Margit Baum Fund are invested in mutual funds, while the remainder of the Margit Baum Fund and the Arthur Barrows Fund are invested in Money Market accounts.

3. **Outside Grants.** In FY 06-07, we began actively seeking grants from charitable foundations to perform needed repairs on our Sanctuary and other properties. To date, \$272,000 has been raised with potential to raise much more as our Sanctuary's value to the historical landscape of Newport, Rhode Island is realized.

4. **Financial Needs.** A capital needs study completed in 2004 concluded the we need to raise \$4.1 million over a 20 year period to completely repair our infrastructure including the deteriorating steeple on our Sanctuary. Additionally, to meet the growing needs of our Congregation, more staff should to be hired and additional space reclaimed from outside rental. During the "Year of Decision", an analysis of Channing's financial needs was conducted to determine what resources are required to meet those needs. As a result of this analysis, the Channing Transition Team (who led the "Year of

Decision” process) concluded that to complete all capital repairs, hire necessary staff, and reclaim space for increased programs we need to:

- a. Raise \$2 million in a capital campaign to be conducted between FY09 and FY15.
- b. Increase the number of pledges by 150 (with an average starting pledge of \$500) over a ten year period.
- c. Increase the total amount pledged by 7% annually from now on.

If we take these actions, we can achieve all of our goals and pay all of our debts by FY 2027 (as portrayed in Chart 2).



Expenditures vs. Income

Capital campaign + pledges + recapture space

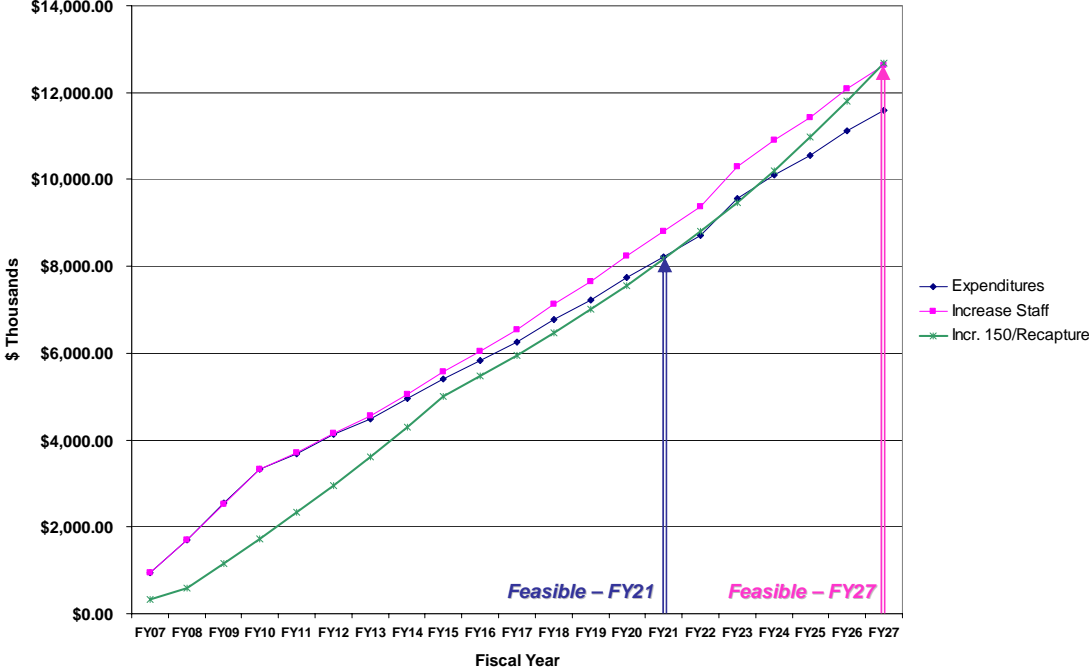


Chart 2: Results of Expenditure vs. Income Analysis

iv. **Other Things We Learned During the “Year of Decision”.**

- 1. We know what the Congregation values about Channing.
 - a. Being part of a loving, caring community.
 - b. Spirituality.
 - c. Respect for a diversity of beliefs.
 - d. The freedom to believe.

- e. Fellowship.
 - f. Service to others.
2. We know why people come to Channing.
 - a. Spirituality / Inspiration.
 - b. Community / Caring / Fellowship.
 - c. Action / Outreach.
 - d. Sacred Space / Music.
 - e. Diversity of beliefs / Shared values.
 - f. Growth and learning.
 4. We know that the Congregation values our Minister and all she brings to our shared ministry.
 5. We know that our Minister and the Congregation value the programs offered at Channing and would like to see them expanded.
 6. We know that our Minister and the Congregation want Channing's presence and activity in the wider world (outreach) to grow.
 7. We know that most people value our Sanctuary as a sacred space and / or as a memorial and historic building that should be preserved.

C. Strengths, Weaknesses, Opportunities, Threats (S.W.O.T.). To continue to thrive and grow, to reach out more proactively into the wider world, to meet the challenges of raising money to repair our properties; it is important to: (1) understand our unique strengths as a Congregation – so that they can be leveraged to meet these challenges, (2) understand our unique weaknesses – so that we can improve in those areas or avoid their emergence as we face our challenges, (3) understand the opportunities in the wider world that we can grasp to help us realize our vision, and (4) understand the threats in the wider world to the achievement of that vision. The “Year of Decision” process was instrumental in identifying Channing’s strengths, weaknesses, opportunities, and threats as summarized in the table below:

Strengths:	Weaknesses:
<ul style="list-style-type: none"> ➤ Strong commitment to sustaining the Church. <ul style="list-style-type: none"> ➤ Steady growth in financial and volunteer support over last decade. ➤ Common understanding and agreement on broad goals. ➤ Broad and deep involvement of Congregation in life and work of the Church. ➤ Ability to resolve serious conflict and move forward. ➤ Capable, professional, caring minister whose goals are aligned with those of Congregation. ➤ A historic Sanctuary valued by the community. ➤ Professional expertise in many areas. ➤ Diversity of interest and talent in Congregation. 	<ul style="list-style-type: none"> ➤ Disagreement on how to achieve broad goals. ➤ Disagreement on best approach to meet financial challenges. <ul style="list-style-type: none"> ➤ “Pay as you go” vs. taking greater financial risks. ➤ Decision-making processes better suited to a “family-size” church – inadequate to a congregation with loftier goals and growing complexity. ➤ Inadequate administrative processes and policies including poor staff management. ➤ Inadequate leadership development. ➤ Cost-intensive buildings and infrastructure. ➤ Inadequate parking and accessibility. ➤ Deep commitment to stewardship needs to be broadened – need a new generation of “big givers”.
Opportunities:	Threats:
<ul style="list-style-type: none"> ➤ Growing community awareness of and interest in Channing Memorial Church’s place in historic Newport. ➤ Growing community interest in social justice issues such as response to climate change, dissatisfaction with war policy, Middle East peace activism, care for the poor, etc. Channing is uniquely placed to be a community leader in discussion and action. ➤ Community interest in a broad and inclusive RE program that permits children to explore and discover their own spirituality. 	<ul style="list-style-type: none"> ➤ Time running out to repair significant infrastructure and building problems – most notably the steeple. ➤ Rising costs and tightening credit environment. ➤ Impatience to get things done within the Congregation. ➤ Our neighbors and their impact on our properties. ➤ Loss of momentum as the scope of our challenges is fully realized.

Table 2: Channing Strengths, Weaknesses, Opportunities, & Threats